[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Client Meeting Brief

Walking into client meetings prepared: objectives, background, attendees, talking points, and the outcome you need.

Meeting details: Client: _____ **Meeting date:** _____ **Location:** _____

Prepared by: _____ **Owner:** _____ **Version:** 1.0

Date: _____ **Review date:** _____

Objective: _____ **Success looks like:** _____

Client background: Client: _____ **Industry:** _____ **Relationship length:** _____

Last contact date: _____ **Open issues:** _____

Key fact 1: _____ **Key fact 2:** _____ **Key fact 3:** _____

Attendees

Name	Role	Organisation	Attending?
Example: **[Attendee name]**	Operations Manager	**[Client name]**	Confirmed
Example: **[Attendee name]**	Finance Lead	**[Client name]**	Confirmed

Talking points

Point	Key message	Supporting evidence
Example: Service levels in May	Response times improved 20%	Service report, May
Example: Renewal terms	Propose the same rate for 12 months	Current contract

Desired outcome and follow-up: Desired outcome: [Desired outcome] **Follow-up actions owner:** _____ **Follow-up by date:** _____ **Next meeting date:** _____

Follow-up action	Owner	Due
Example: Send the revised proposal	Account Manager	Within 3 working days

Completion checklist: [ ] The objective and the desired outcome are written before the meeting.

[ ] Every talking point has a key message and evidence, not just a topic name.

[ ] Follow-up actions have owners and dates, and the next meeting is booked.