[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. Add or remove table rows to fit your needs. 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	**[Client name]**
Meeting date	**[Meeting date]**
Location	**[Location]**
Prepared by	**[Prepared by]**
Owner	**[Name and role]**
Version	1.0
Date	**[DD Month YYYY]**
Review date	**[DD Month YYYY]**
Objective	**[Objective]**
Success looks like	**[Desired outcome]**

Client background

Client	**[Client name]**
Industry	
Relationship length	
Last contact date	
Open issues	
Key fact 1	
Key fact 2	
Key fact 3	

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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

✓	Check
☐	The objective and the desired outcome are written before the meeting.

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✓	Check
	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.