Ashford Business Services Ltd

Client Meeting Brief

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

Meeting details

Client	Sarah Mitchell
Meeting date	**9 November 2026**
Location	**Boardroom, 12 Church Street, Birmingham**
Prepared by	**Prepared by**
Owner	**James Patel, Office Manager**
Version	1.0
Date	**9 November 2026**
Review date	**9 November 2026**
Objective	**Objective**
Success looks like	**Desired outcome as agreed at the meeting.**

Client background

Client	Sarah Mitchell
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: **Sarah Mitchell**	Operations Manager	**Sarah Mitchell**	Confirmed
Example: **Sarah Mitchell**	Finance Lead	**Sarah Mitchell**	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 as agreed at the meeting.**

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

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Follow-up action	Owner	Due

Completion checklist

✓	Check
	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.