**[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** | |

# [Company name]

## 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 |
| | | |

## [Company name]

| 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. |