

Your Clients' Shoes – The Shoes that Matter!

1-Page Tool

Client Meeting Agenda Template

[Source: adapted from 'Stop Selling & Do Something Valuable', Steve Walmsley, (2007)]

To: _____	Date: _____		
From: _____			
Subject: _____			
<u>Preamble</u>			
<u>Our Objective for a Meeting</u>			
<u>Our Current Understanding of Your Situation</u>			
<u>Questions to be discussed during the meeting</u>			
Our Questions for You			
About our Capabilities			
Your Questions for Us			
<u>Other Areas of Interest to You</u>			
<u>Next Action Steps & Timetable</u>			
	<u>Who?</u>	<u>What?</u>	<u>When?</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____