

# MEETING TEMPLATE

Organization name: \_\_\_\_\_ Date and time of meeting: \_\_\_\_\_

Fill out the template below before engaging with a prospect or client to ensure success at your next meeting. Share the plan with your team so everyone is prepared.

## AGENDA

What do you hope to address in the meeting and in what order?

## ATTENDEES

Who will be at this meeting? What are their titles and responsibilities?

## PROSPECT/CUSTOMER GOALS

Why is the prospect/customer meeting us? What do they hope to get out the interaction?

## OUR GOALS

Why are we meeting with this prospect/customer? What do we want to get out of the interaction?

## NEXT STEPS