

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)]

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