



Your **Clients'** Shoes – The Shoes that Matter!

1-Page Tool

Client Meeting Agenda Template*

<p>To: _____ Date: _____</p> <p>From: _____</p> <p>Subject: _____</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 style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%; text-align: center;"><u>Who?</u></th> <th style="width: 40%; text-align: center;"><u>What?</u></th> <th style="width: 30%; text-align: center;"><u>When?</u></th> </tr> </thead> <tbody> <tr> <td>1. _____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>2. _____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>3. _____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>4. _____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>5. _____</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>																
1. _____	_____	_____																
2. _____	_____	_____																
3. _____	_____	_____																
4. _____	_____	_____																
5. _____	_____	_____																