



Meeting: _____ Date: _____

Attendees & titles:

Desired outcomes (issues to be resolved, opportunities to advance, questions to be answered in meeting):

1. _____
2. _____
3. _____
4. _____

Meeting agenda:

<u>Time</u>	<u>Topic</u>	<u>Owner/Presenter</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Pre-meeting information needed: _____

Introduction key points: _____

Status, facts, background: _____

Alternatives to consider: _____

Client evaluation criteria: _____

Benefits of proposed solution: _____

What makes key points believable: _____

Next steps: _____

_____:

Call and Meeting Preparation Template

Meeting Notes:

Key Points:

Decisions Made:

Actions to be taken:

✓	Actions	Owner	Due Date	Comments