CLIENT AND STAKEHOLDER MEETINGS

Client Discovery Agenda

[Client name]

MEETING DATE
[Month day, year]

LENGTH
45 minutes

TIME	LOCATION	CLIENT LEAD	OUR LEAD
[00:00] to [00:00]	[Room or video link]	[Name, role]	[Name]

ATTENDEES [Names]

Objective

> *Understand [client]'s goals, problems and limits well enough to propose something that fits, and agree the next step.*

Listen more than you talk. If you're presenting your solution in this meeting, you started too early.

Before the meeting

- Read the client's website, recent news and anything they sent in advance.
- Write your top [5] questions. Send the agenda so they can bring the right people.

Agenda (45 minutes)

No.	Min	Item	Lead	Purpose
1	**5**	**Introductions and purpose** Who's here and what we want to leave with.	[Our lead]	Inform
2	**12**	**Goals** What does success look like in [12] months? How will they measure it?	[Client lead]	Discuss
3	**12**	**Current situation and challenges** What they do today, what isn't working, what they've tried.	[Client lead]	Discuss
4	**8**	**Requirements and constraints** Budget range, deadline, who decides, must-haves.	[Our lead]	Discuss
5	**8**	**Next steps** What we'll send, by when, and who else needs to be involved.	[Our lead]	**Decide**

Questions to ask

Area	Question	Answer
Goal	What would make this a success for you?	[Answer]
Problem	What happens if nothing changes?	[Answer]
History	What have you already tried?	[Answer]
Decision	Who else is involved in deciding, and how?	[Answer]
Budget	Is there a budget range set aside for this?	[Answer]
Timing	Is there a date this has to be in place by?	[Answer]

MEETING RECORD

Client Discovery Agenda

NOTETAKER
[Name]

What we heard

Send this back to the client within a day to check you understood them.

Topic	Summary
Goals	[In their words]
Main problems	[In their words]
Must-haves	[List]
Budget range	[Range, or not shared]
Who decides	[Names and roles]
Deadline	[Date and why]

Decisions, actions and parking lot

Type	What was agreed	Owner	Due
Action	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Parked	[Topic, and where it goes next: meeting, email, next agenda]	[Name]	[Date]

Notes

[Anything else worth keeping: numbers quoted, open questions, who to follow up with]