Client Meeting Notes

[Client name]

Date	[Month day, year]	**Meeting type**	[Kickoff / Review / Sales]
Client attendees	[Names, titles]	**Our attendees**	[Names, titles]

Purpose

[Why we met.]

What the client told us

[Goals, concerns and requirements, in their words where it matters.]

What we agreed

Agreement	Confirmed by
[Agreement]	[Name]
[Agreement]	[Name]

Follow-up

Action	Owner	Side	Due
[Action]	[Name]	[Client / Us]	[Date]
[Action]	[Name]	[Client / Us]	[Date]

Next contact

[Date and method].