|  |  |
| --- | --- |
|  | Meeting report summary |

|  |  |
| --- | --- |
| **Prospective client name** |  |
| **Meeting date** |  |
| **Individuals present** |  |
| **Goal statement** |  |

Quantitative

Score each outcome on a scale of 1 to 5 according to the following key:

|  |  |
| --- | --- |
| **1** | Strongly agree |
| **2** | Agree |
| **3** | Neutral |
| **4** | Disagree |
| **5** | Strongly disagree |

|  |  |
| --- | --- |
|  | **Score** |
| **Prospective client** |
| Client has clearly defined their current situation |  |
| Client has shared their goals |  |
| Client has defined success factors to achieve goals |  |
| Client has clarified the role the firm is expected to play in achieving goals |  |
| **Competition** |
| Client has shared the concerns they have with their current/prior service provider |  |
| Client has clearly defined the capabilities the winning service provider must have |  |
| Client has provided a list of competitors |  |
| **Decision-making** |
| Client has clarified who makes the decision, how it will be made and when it will be made by |  |
| Client has provided the criteria that will be used to select the winning firm |  |
| Client has defined next steps, including process and timeline |  |

Qualitative

**Positives**

Three things you did well:

1. List here
2. List here
3. List here

**Concerns**

Three things you didn’t do well:

1. List here
2. List here
3. List here

**Recommendations**

Three things you would do differently to improve your performance next time:

1. List here
2. List here
3. List here

**Next steps**

Proposed next steps to move the sales process forward:

1. List here
2. List here
3. List here