

Client:

Date:

Attendees:			
Name	Position	Email	Phone

- Prep:**
- Select pre-recorded videos to be shown during meeting.
 - Choose SMEs to listen in/offer feedback.
 - Ping attendees to remind them of meeting and provide a precursory agenda.
 - Send meeting box out to all attendees (if applicable)
 - Pre-call research on all attendee—send LinkedIn invite prior to call

- Objectives:**
- Discover potential opportunities to collaborate and produce mutual wins.
 - Discuss referral program.
 - Identify specific areas to improve upon
 - Discuss potential solutions.
 - Discuss solution implementation

- Agenda:**
1. Open/welcome
 2. Introductions
 3. Brief history of participants/company
 4. Discuss objectives and vision.
 5. Discuss next steps-
 - a. Better understand current set-up
 - b. Build a strategic plan of where we are at and where we’re going. Define different models based on company type.
 - c. Decide financial inputs to bring the plan together.
 - d. Build life team members.
 6. Closing comments