Customer Meeting Planner

CUSTOMER	MEETING DATE	TIME WE HAVE	RELATIONSHIP STATUS

1. Define the meeting

Get clear on what you want and what your customer expects from this time.

My meeting goal(s)	
Customer's expectations	
What I need to learn	
What value I will deliver	

2. Understand the attendees

List each attendee, their role, and what matters most to them.

NAME AND TITLE	ROLE	KEY INTERESTS AND LIKELY QUESTIONS

3. Plan the discussion

List the agenda topics and the key question(s) you will ask for each, then send the agenda in advance.

TOPIC	KEY QUESTION TO ASK

- [ ] Agenda sent to attendees in advance (see the sample email on page 2)

4. Open with intention

Take the lead with a short opening (2 to 5 minutes).

- [ ] Decide which handouts or links to provide
- [ ] Greeting and rapport
- [ ] Recap what led to this meeting
- [ ] Purpose, benefit, and time check
- [ ] Transition to the first topic

5. Close and lead forward

Summarize, confirm next steps, and close confidently.

- [ ] Summarize key points
- [ ] Confirm next steps, owners, and timing
- [ ] Ask for feedback
- [ ] Thank them and close
- [ ] Send a recap (and a handwritten note if appropriate)

Sample Agenda Email

Copy this email, fill in the bracketed details, and send it to your contact a few days before the meeting.

TO [Customer contact]

SUBJECT Agenda for our [day] meeting

Hi [First name],

Thank you for making time to meet on [date] at [time]. To make the most of our [30] minutes together, here is what I would like to cover:

1. [Topic 1]
2. [Topic 2]
3. [Topic 3]

Is there anything else you would like to add to the agenda? Just reply with any topics or questions, and I will include them.

I look forward to our conversation.

[Your name]

Prepare with AI in five minutes

Paste this into your AI service before your meeting:

> *"I'm meeting with [customer] about [reason/topic], and our relationship is [Strong, Developing, At Risk, or Uncertain]. Help me define my goal, what they may expect, what I need to learn, the value I can deliver, three agenda topics, and one question to ask for each."*

Want your customer-facing teams to lead these conversations with confidence? Explore the Bold Value Customer Growth system →