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**SOP- Strategy Sessions with Existing Clients- Systems Vault**

**PREREQUISITES**

[Master: SOP- Strategy Sessions- Systems Vault](https://docs.google.com/document/d/1NRfraBF2DpZ-FGLz2vqGMNE5y6zfVduIP7Pd3Wc_lnc/edit?usp=sharing)

[Master: Guidelines- Taking Client Meeting Notes- Systems Vault](https://docs.google.com/document/d/1dZrXZqkN4k0zEQx_FvvcU39_XdOuuppPSED07DgfSAw/)

[Master: Guidelines- Client Expectations- Systems Vault](https://docs.google.com/document/d/1DDp3y7Npb4mT3_F9fEdbdUS8eQ2HODgYk8HsTJD6u8E/)

[Template: Invite to Strategy Call for Existing Clients- Systems Vault](https://docs.google.com/document/d/1rz_WPFSDYAwJLrZzwg96POgSSBWfqZgwVzobEEEaw5o/edit)  
[SN Template (Email): Strategy Call Agenda- Systems Vault](https://docs.google.com/document/d/1W-8qhi6ooi6bRs3reFGyoDSRVGrA5WyW21G15Gd2XW4/edit)

[SOP- Creating a Monthly Action Plan- Systems Vault](https://docs.google.com/document/d/1OJ-90jyOn2GfDwOWTamdO48V9TuAjE3AH-veXHYq40A/edit?usp=sharing)

[SOP- Task Management- Systems Vault](https://docs.google.com/document/d/1oGhOzbOIGKAnS-01sNyhcUzXfYbaUlWYjGva2rL6fxQ/edit?usp=sharing)

[Template: Monthly Action Plan- Systems Vault](https://docs.google.com/document/d/1YrbDgqqOZv-l7MElMi3M2iO-8bg2zqvqHq7LLwGnNeg/edit)

[Teamwork PM](http://sarahnoked.com/teamwork)

Client Folders

**PURPOSE**

We hold monthly strategy calls (or more depending on the retainer size) with clients to ensure that we stay on the same page and provide monthly opportunities for strategy and brainstorming with each client.

**POLICY**

Prior to every strategy call with an existing client, the project manager drafts an agenda, creates a Teamwork Notebook, and emails the agenda to the client. The project manager is aware of the client’s available retainer hours prior to the meeting and takes detailed notes. All action items are assigned immediately following the meeting.

All client strategy calls between clients and the Sarah Noked team are recorded to ensure that:

1. Every team member understands what the clients want, even if they aren’t sitting in on the meeting.
2. The project manager can easily assign tasks after the meeting.
3. The project manager & client expectations are matched.

**Strategy meetings with Existing Clients are generally 1 hour**

Tasks for OBMs to schedule Strategy Calls with Existing clients is a recurring task under the client project in [Teamwork PM](http://sarahnoked.com/teamwork)

All client meeting notes are saved to the respective client folders here: Client Folders

**PARTY**

OBMs

**PROPERTY**

Agency Manager / Lead OBM

**PROCESS**

Part 1: Meeting Prep

Part 2: Meeting Notes

Part 3: Setting Client Expectations

Part 4: Assigning Tasks for Follow up

**PROCEDURE**

**Part 1: Meeting Prep**

1. Set a meeting with the client using the [Template): Invite to Strategy Call for Existing Clients- Systems Vault](https://docs.google.com/document/d/1rz_WPFSDYAwJLrZzwg96POgSSBWfqZgwVzobEEEaw5o/edit)
2. Create Meeting Notes for the meeting using [Template: Meeting Notes- Systems Vault](https://docs.google.com/document/d/1iAkiqa7MQ1-ZzXV6WW4d-MQMz17N2obN7NdZMC3IgiI/edit) and follow the pre-meeting steps in [SN Master: Guidelines- Taking Client Meeting Notes- Systems Vault](https://docs.google.com/document/d/1gQE82ZsuoFCwpULP8clxEYMAXl4lv6KW0SrYpstzIQc/edit).
3. Email agenda discussion points to the client prior to the meeting using [Template:: Strategy Call Agenda- Systems Vault](https://docs.google.com/document/d/1W-8qhi6ooi6bRs3reFGyoDSRVGrA5WyW21G15Gd2XW4/edit)
4. Check available retainer hours and come prepared to offer the client the amount of work that can feasibly be accomplished in the span of these hours.

**Part 2: Meeting Notes**

1. Follow the steps outlined in the “During Meeting” section of [Master: Guidelines- Taking Client Meeting Notes- Systems Vault](https://docs.google.com/document/d/1gQE82ZsuoFCwpULP8clxEYMAXl4lv6KW0SrYpstzIQc/edit).
2. Save client meeting notes in Client Folders

**Part 3: Setting Client Expectations**

1. During the meeting, follow point 4 of [Master: Guidelines- Setting Client Expectations- Systems Vault](https://docs.google.com/document/d/1cyu62Ra59NM4nXpOqercAfrGpxM4_a5oAFlFeeqOaH0/edit)

**Part 4: Assigning Tasks for Follow Up**

1. Extract all action items and list them in the Teamwork Notebook under each Discussion Point; follow “Post-Meeting” section of [Guidelines: Taking Client Meeting Notes](https://docs.google.com/document/d/1gQE82ZsuoFCwpULP8clxEYMAXl4lv6KW0SrYpstzIQc/edit).
2. Assign all action items to the appropriate SN team member or client in Teamwork by referencing the “Assigning Tasks” section of [SOP- Task Management- Systems Vault](https://docs.google.com/document/d/1oGhOzbOIGKAnS-01sNyhcUzXfYbaUlWYjGva2rL6fxQ/edit?usp=sharing).
3. Reinforce client expectations by sending [SN Template (Email): Post-Strategy Call Report- Systems Vault](https://docs.google.com/document/d/1Hhv2oSWlgw04uU8q0IvCErO-fOESHpWtmv-kk5hqTg4/edit) / [SN Template (Email): Monthly Action Plan- Systems Vault](https://docs.google.com/document/d/1YrbDgqqOZv-l7MElMi3M2iO-8bg2zqvqHq7LLwGnNeg/edit) after you have assigned all tasks.

**Created by:**

**Department:** Delivery

**Date:**

**Revised:**

**Revised by:**