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**Master: Guidelines- Client Meeting Notes- Systems Vault**

***Regardless of meeting type, notes are taken in real time in a Teamwork Notebook during every meeting with a potential or current client using the*** [***Template: Meeting Agenda***](https://docs.google.com/document/d/15lw2K8gYpYAcyCO7LP_eF77LJ_eB2ZV1tenYWABS1ew/edit?usp=sharing)***.***

**1. Prior to the meeting:**

* 1. Copy/paste [Template: Meeting Agenda](https://docs.google.com/document/d/15lw2K8gYpYAcyCO7LP_eF77LJ_eB2ZV1tenYWABS1ew/edit?usp=sharing) into a new Teamwork Notebook in the client’s Teamwork Project
  2. Title of the notebook is MEETING TYPE: DATE OF MEETING
  3. Subtitle of the notebook is PEOPLE PRESENT IN THE MEETING
  4. Outline the Discussion Points using the [Template: Meeting Agenda](https://docs.google.com/document/d/15lw2K8gYpYAcyCO7LP_eF77LJ_eB2ZV1tenYWABS1ew/edit?usp=sharing), leaving the other areas blank for use during/after the meeting.

**2. During the meeting**

1. Below each discussion point, record what is discussed between you and the client during the meeting.
2. Don’t worry about formatting here. Record your conversation and key points in the way that makes the most sense to you and allows you to conduct the meeting smoothly. It might be sloppy and stream of consciousness. What’s important is getting down all the details - regardless of typos.
3. EXTRACT the action items! Keep an ear to the things that need to happen/assets that need to be created/ team members that need tasks assigned. Also, if a client mentions something on their ‘wishlist’ this gets added to a task list ‘bucket item’. It’s keeping these things in mind that make us superstars

**3.**  **Post-meeting:**

1. In the Teamwork notebooks, extract a list of Action Items under your notes for each discussion point.
2. Note which team member (or client) is responsible for each task.
3. IMMEDIATELY Assign all tasks with appropriate deadlines in [Teamwork PM](http://sarahnoked.com/teamwork) or in the client’s project management tool.