Now that the team has done its background research and has prepared meaningful questions to discuss with your client, it is time to hold your first meeting with your client. The Client Requirements Gathering meeting is an opportunity to get to know your client, understand more about their needs, and get answers to the critical questions your team has in order to move forward on your project.

Reach out to your client to schedule a meeting. This meeting should occur at a time most convenient to your client and during normal business hours. Once a meeting time has been agreed upon, be sure to send your client and all your team members a calendar invite along with a virtual meeting link to use.

Please copy your instructional team on all your client correspondence and calendar invitations.