

Client Meeting Form

Project Name Garvis
Your Name Haley Overhouse
Meeting Date 1/25/18

PRE-MEETING PREPARATION

- What functionality do they need?
- Plan to sit with Lisa (office recp) & see what could help her, what she currently has, what would she like
- Follow Braeden & Mike around, see what they're currently using to keep track of appointments, clients, jobs, communicate with Lisa, and history of jobs.
- Show them layout we have so far, what more we plan to add to it, and ask if/what more they would like added or changed.

MEETING NOTES

- View work order schedule by day & time
"schedule"
- Name, address, phone #, job description, quoted price, day, time, duration, extra notes, completed check box
"work order"
- Name, address, phone #, email, home owner notes, past/present work orders, edit
"client profile"
- Keep simple / user friendly.

CLIENT SIGNATURE

Signature

As the project client, your signature indicates that the team member named above attended and contributed to this meeting.

Braeden B

Signature

1-25-18

Date