**General Guidance on Client Meetings.**

**Who attends and when?**

* **Client meetings to discuss an on-going project** 
  + One representative from CM team to attend
* **Client meeting to discuss a new opportunity/proposal**
  + Client relations need to be driving and attending this meeting
  + CM to attend as long as it has no negative impact on day to client work and it is deemed necessary for you to be there
    - So consider is your CE and Senior in the office?
    - How busy are you, CM’ing current work?
* **Weekly status meeting (offsite)**
  + One CM or CE to attend\*
* **Monthly meeting**
  + Two reps may attend the monthly meeting
    - Will need to be discussed and agreed on a client by client basis
* **Quarterly strategy meeting**
  + Senior CM or Head of CM to attend

We should only have 2 reps from the CM meeting at strategically or commercially important meetings / or in handover/ training situations.   
If you are unsure please flag with Head of CM and we can discuss and agree on a client by client meeting basis.   
  
**General notes:**

* \*There will be exceptions to the above guide – this should be discussed with Head of CM if not already agreed
* Ensure everyone in your team knows you are out of the office at a meeting; that your work will be covered – and they know your expected return to the office
* Having regular catch ups to build relationships with clients is obviously v important but we always need to consider the impact on all our client work when out of the office
  + For example try and not book meetings out of the office on days when your CE/CM’s who support you on the account are out of the office or on very busy production days for your clients