

Meeting agenda template

Preparing an agenda helps ensure that your meeting is productive. It also shows clients you value their time and work to understand their needs. You can think of it like a roadmap for the meeting. It outlines the destination and the steps you'll take to get there.

Set the meeting objective.

You can prepare yourself by looking new clients up online and reviewing information that is publicly available. If they have a business, look that up too. For existing clients, review your notes from previous interactions.

Share meeting details and prepare the client.

A good agenda provides the time, date, and location of the meeting, and features your letterhead and/or logo. List the objective of the meeting and the discussion topics. Be sure to mention any pre-work or materials that clients should bring with them.

Let the client identify the first agenda item.

Leave the first agenda point blank for the client to fill in. This will give you insight into what they view as a priority. It also helps ensure they leave the meeting with their concerns and questions addressed.

Set time for each discussion topic.

Estimate how much time you'll need to go over each topic. This will help you prioritize time for the most important items.

Send the agenda in advance.

Be sure to email the agenda to the client 2-3 days in advance of the meeting.

We help. You grow.

Sun Life Assurance Company of Canada and SLGI Asset Management Inc. are members of the Sun Life group of companies.
© Sun Life Assurance Company of Canada, 2024. All rights reserved. 810-5157-05-24



Financial Company

Example

meeting agenda for a video conference

Meeting objective: Review the 3 recommended plans and select which one to move forward with.

Date: Tuesday, March 15

Time: 1:00 – 1:45 p.m.

Location: [Link to video conference](#)

- Set yourself up in a private space and use headphones if you're in a noisy environment.
- Click the link above to join the video conference room and connect with computer audio.
- If your preference is to speak face-to-face, please be prepared to be on video.
- If the connection drops, hang tight and I'll call you on your cell phone.

Preparation required:

- Please sign and complete the attached forms and bring them to our meeting.

Agenda

What's top of mind for you? Please write down anything you'd like to bring up with me. • • •	10 minutes
Plan A • Features & benefits • Risks • Cost	10 minutes
Plan B • Features & benefits • Risks • Cost	10 minutes
Plan C • Features & benefits • Risks • Cost	10 minutes
Summarize next steps + book follow-up meeting	5 minutes

<Your letterhead or logo>

Meeting objective:

Date:

Time:

Location:

Preparation required:

Agenda

What's top of mind for you? Please write down anything you'd like to bring up with me.	
Next steps	