

Meeting Planner

Planned Meeting Date:	Customer / Opportunity Id:
Business Alignment (VP):	Problem Alignment (3Ys):

Agenda	
Was the agenda shared with Customer?	
Customer agenda items / objectives	
Outstanding actions to address?	
Meeting Objectives	
Desired Next Steps	

Account Team Attendees:	Meeting Goals / Responsibilities
RSM	
SE	
RD	
Ecosystem	
Channel	

Expected Customer Attendees:			
Name & Title	Role in Deal	Status	Pain Hypothesis

Post Meeting Debrief
Did we achieve our meeting objectives & desired next steps?
Did the customer achieve their objectives / gain value from the meeting?
What actions / owners / deadlines were captured? What/Who/By When?
Reflection: What didn't go well? Areas for improvement? Next steps if we failed to achieve any objectives