Client Meeting Notes Template

Notes from a meeting with a client: what they need, what worries them, what was agreed and what each side does next. Internal document — the client-facing version is the recap email.

Client / company	
Date	
Client attendees (name, role)	
Our attendees	
Meeting type	check-in / review / project / renewal / other

Summary

2–3 sentences.

Client goals and needs

In the client's own words where possible.

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Concerns and complaints

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Feedback on our work or product

Feedback	Who said it

Agreements

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Next steps — our side

Action	Owner	Due date

Next steps — client side

Action	Owner	Due date

Risks to the relationship

Signals of dissatisfaction, budget changes, a champion leaving, a competitor mentioned.

Open questions

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How to fill it in

- **Client's words for client's problems.** Don't translate their pain into your jargon.
- **Don't soften complaints.** Record them as they were said.
- **Client tasks matter as much as yours.** Most delays come from the client side.
- **Risks read between the lines.** A polite "we'll see" about renewal is a risk — note it.
- **No promises that weren't made.** Prices, dates and scope only as agreed.