

RAINMAKER! TOOLS & RESOURCES

SAMPLE CUSTOMER MEETING AGENDA E-MAIL

John,

Thank you again for your willingness to meet on _____.
I look forward to seeing you at 9 a.m.

In reflecting on this first meeting, I have prepared a few questions I would like for us to consider. These questions can serve as our agenda of sorts. Your answers to these questions and others will provide us with a stronger sense of your direction and define how we may potentially be a resource to you.

Have a good week!

1. _____ is known for its leadership in the _____ industry. As you continue to seek areas for growth, what is your short and long-term strategic vision and plans?
2. In light of this direction, how will your organization have to change in the near future?
3. What strategies have worked well in the past? Why?
4. What strategies have NOT worked well in the past? Why?
5. What are the biggest hurdles your people face in working with their customers?
6. If cost and resources were not a constraint, what would you like to achieve as a result of our involvement with your company?