End of Sales Contract Meeting Agenda

A meeting agenda makes you look like a professional. An end of sales contract meeting is a professional way to end a business relationship - and just might be your secret weapon to renew the contract!



Purpose: Close-out and review the success and failures of the two company's business relationship

- [ ] Distribute a written agenda prior to the meeting
- [ ] Have key players on your team present, and invite the client's key players

Intro:

- [ ] Introduce all participants and their role
- [ ] Review the contract timeframe, budget and goals

Key Points:

- [ ] Present specific, measurable outcomes of the goals and budget
- [ ] Discuss why certain goals were not met, and what was adjusted midstream to meet the goal
- [ ] Define your biggest accomplishments and successes on the contract
- [ ] Point out any opportunities you've identified for the client

Closing:

- [ ] Explain your transition strategy
- [ ] Provide client with all relevant documents, data and passwords
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- [ ] Offer client names of potentially useful resources and contacts
- [ ] Ask the client if there is anything else you can do to facilitate their transition to a new vendor, product or relationship
- [ ] Thank the client for their business, and wish them luck

After the Meeting:

- [ ] Send the client a thank you note documenting your end of contract meeting, your offer to provide all relevant documents, and thanking them for their business
- [ ] Conduct a client exit survey

Clients leave, and clients come back. Demonstrating professionalism and cooperation in an end of contract meeting can open the door to future business and recommendations.

Created By Anthony Caliendo - http://www.thesalesassassin.com/