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.