

Client Update Meeting Checklist



- ☐ Hold an internal discussion with key project personnel in advance of the meeting to identify progress as well as challenges to progress.
- ☐ Compare the actual status of the project against anticipated/scheduled progress of the project.
- ☐ Identify specific causes of any gap between actual and expected progress.
- ☐ Come up with possible solutions to those challenges internally, in advance of the meeting.
- ☐ Arrange an accurate, comprehensive means of recording the entire discussion.

4 KEY POINTS FOR MEETING LEADERS

- ☐ Begin with a factual presentation of project progress and the identification of challenges to anticipated or scheduled progress
- ☐ Address any concerns you have about project budget and/or project scope
- ☐ Hold positive, proactive discussions to resolve challenges through accommodation, compromise and/or collaboration
- ☐ Conclude the meeting with a recap of the discussion and a clearly identified goal for the next scheduled goal for the next scheduled update