

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.

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