**Client Onboarding Meeting Minutes**

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| --- | --- | --- | --- |
| **Date:** |  | **Time:** |  |
| **Location:** |  | **Meeting Called by:** |  |
| **Meeting Facilitator/Chairperson:** | |  | |
| **Note Taker/Recorder:** | |  | |

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| **Client Organization:** |  |
| **Client Representatives Present:** |  |
| **Company/Representatives Present:** |  |

**1. Meeting Purpose**

* Outline the objectives of the onboarding meeting.
* Introduce the client to the company’s services, processes, and key contacts.
* Discuss expectations, timelines, and deliverables.

**2. Agenda**

1. Welcome and Introductions
2. Overview of Services / Products Offered
3. Understanding Client Needs and Goals
4. Project Scope and Deliverables
5. Communication and Reporting Protocols
6. Key Contacts and Roles (Client & Company)
7. Next Steps and Action Items

**3. Key Discussion Points**

* **Client Objectives:**
* **Project Scope / Services Agreed:**
* **Timelines / Milestones:**
* **Budget / Pricing Discussion (if applicable):**
* **Compliance / Documentation Required:**

**4. Action Items & Responsibilities**

| **Action Item** | **Responsible Party** | **Due Date** | **Status** |
| --- | --- | --- | --- |
| Example: Submit required documents | Client | Sept 20, 2025 | Pending |
| Example: Share project plan draft | Company | Sept 25, 2025 | Pending |

**5. Decisions Made**

**6. Next Meeting / Follow-Up**

* **Date & Time:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Agenda for Next Meeting:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Prepared By:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
**Approved By (Client Representative):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
**Approved By (Company Representative):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_