**Vision Meeting Agenda Template**

***[Customer Logo Here]***

**Attendees:** Primary Point of Contact (POC), Executive / Manager at a level above your POC, IT Contact, Finance Department Contact, System Users, and any other key stakeholder.

**Time:** Three to four hours.

**Agenda**

1. Agenda Review

*Invest a few minutes to explain the agenda so the audience understands the journey of the next few hours, positioning you as the leader of the session.*

1. Deliverables and Services Update

*Invest 15 – 45 minutes (depending on the number of changes) illustrating your company’s services – all of them. This is not a time to give an in-depth overview, but it is a time to remind your customer about all your deliverables. It is possible that your best customers aren’t using most of your services and may not know about them. The purpose of delivering this at the beginning of the meeting is to enable the audience to recall your services later in the discussion. For example: “That proactive health monitoring would be perfect for that.”*

1. Direction of Technology

*Move into the direction of your industry and what’s to come in the next few years. This is your chance to illustrate your mastery of the industry, an understanding of their business, and position yourself as a subject matter expert. This section can be replicated across all tier one and tier two customers.*

1. Next Three to Five Years at Your Facility
   1. Your Vision for the Client
   2. Your concerns and questions
   3. Open discussion
   4. Short-term (< one year) actions

*This section will likely take an hour or more, and requires preparation by your customer. Position this section weeks ahead of time with your POC as “Take some time with your team to discuss the vision of the next three to five years and where our technology fits – including your concerns and questions.”*

1. Year in Review - Our Performance

*This is your chance to brag and your customer’s chance to give you feedback. The reason to position this topic last on the agenda is because it could take up the entire time of the meeting with no value. Make this the last topic and allow 15 – 30 minutes for discussion.*