

TEMPLATE 1 OF 4

Client Discovery Meeting

Clarify the client's situation, desired outcome, decision process, and next step.

DATE AND TIME

FACILITATOR OR OWNER

ATTENDEES AND ROLES

REQUIRED OUTCOME

AGENDA

☐	Introductions and purpose	MINUTES
☐	Current situation and constraints	MINUTES
☐	Desired outcomes and success measures	MINUTES
☐	Questions and options	MINUTES
☐	Decision process, owners, and next step	MINUTES

DECISIONS AND RATIONALE

ACTIONS - OWNER - DUE DATE

TEMPLATE 2 OF 4

Weekly Team Check-In

Keep status reporting brief and use shared time for risks, decisions, and coordination.

DATE AND TIME

FACILITATOR OR OWNER

ATTENDEES AND ROLES

REQUIRED OUTCOME

AGENDA

☐	Wins and changes since last week	MINUTES
☐	Priority outcomes	MINUTES
☐	Risks, blockers, and decisions	MINUTES
☐	Cross-team coordination	MINUTES
☐	Commitments before next meeting	MINUTES

DECISIONS AND RATIONALE

ACTIONS - OWNER - DUE DATE

TEMPLATE 3 OF 4

Quarterly Planning Session

Review evidence, choose priorities, and leave with owners and measurable outcomes.

DATE AND TIME

FACILITATOR OR OWNER

ATTENDEES AND ROLES

REQUIRED OUTCOME

AGENDA

☐	Results and lessons	MINUTES
☐	Customer and operating signals	MINUTES
☐	Priority choices and tradeoffs	MINUTES
☐	Resources and dependencies	MINUTES
☐	Owners, measures, and review cadence	MINUTES

DECISIONS AND RATIONALE

ACTIONS - OWNER - DUE DATE

TEMPLATE 4 OF 4

Decision Meeting

Frame one decision clearly, compare viable options, and document the result.

DATE AND TIME

FACILITATOR OR OWNER

ATTENDEES AND ROLES

REQUIRED OUTCOME

AGENDA

☐	Decision to make	MINUTES
☐	Decision criteria	MINUTES
☐	Options and evidence	MINUTES
☐	Risks and dissenting views	MINUTES
☐	Decision, owner, communication, and review date	MINUTES

DECISIONS AND RATIONALE

ACTIONS - OWNER - DUE DATE