SPECIALIST WORKFLOWS

Consultant meeting brief template

A pre-meeting brief for setting purpose, desired decision, attendees, evidence, agenda, risks, and follow-up ownership.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

An important client meeting needs more than a calendar invite.

WORK THROUGH THE CHECKLIST

- [ ] 01 **State the meeting purpose**
- [ ] 02 **Name desired decision**
- [ ] 03 **List attendees and roles**
- [ ] 04 **Prepare evidence**
- [ ] 05 **Set agenda and timing**
- [ ] 06 **Assign follow-up owner**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.