Sales Meeting Minutes

[Your Company Name]

MINUTES

Date: [DD/MM/YYYY]
Time: [ ]
Mode: [In person / Call / Video]

MEETING DETAILS

CLIENT / PROSPECT
[Company] · [Contact name, role]

ATTENDEES
Client: [ ]
Our team: [ ]

PURPOSE

[Discovery / Demo / Proposal review / Negotiation / Review]

DISCUSSION SUMMARY

Topic	Key points
Client needs	[ ]
Current process / tools	[ ]
Budget and timeline	[ ]
Decision makers	[ ]
Concerns / objections	[ ]

DECISIONS AND AGREEMENTS

[What was agreed]

ACTION ITEMS

Action	Owner	Due
[ ]	[ ]	[ ]
[ ]	[ ]	[ ]
[ ]	[ ]	[ ]

NEXT MEETING

Date: [ ] · Purpose: [ ]

Send these minutes to attendees within 24 hours and log them on the client record.