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|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|   | **CATCH-UP MEETING** |   |   |   |   |   |   |   |   |   |
|   | Friday, 10 Nov 2023, 2:00PM |   |   |   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|   |   | **ATTENDEES** |   |   |   |   |   |   |   |   |   |   |
|   |   |  | Erin Goodwill |  | Barbara Warren |  | Unknown Person |  | Unknown Person |   |   |
|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|   |   | 👋 | CATCH UP |   |   |   |   |   |   |   |   |   |   |
|   |   | How is everything going since we last chatted? |   |   |
|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|   |   | We started the meeting and created a friendly, conversational atmosphere. We all know that this is an opportunity for the customer success team to ask how everything has been going since the last time we spoke, and to catch up on any news. |   |   |
|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|   |   | ⚡ | INSIGHTS |   |   |   |   |   |   |   |   |   |   |
|   |   | Takeaways from this meeting |   |   |
|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|   |   | In this part we include any feedback or concerns that the customer raised, as well as any suggestions or best practices that the customer success team offered to help the customer get the most out of the product or service. |   |   |
|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|   |   | 📔 | MEETING NOTES |   |   |   |   |   |   |   |   |   |   |
|   |   | Write down notes from our discussion |   |   |
|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|   |   | Carefully take couple of notes on all the points covered during the meeting. This helps to ensure that nothing is forgotten and that all action items are captured for follow-up after the meeting. |   |   |
|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|   |   | ⏭️ | NEXT STEPS |   |   |   |   |   |   |   |   |   |   |
|   |   | What are our next steps? |   |   |
|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|   |   | Outline what came out as the most important conclusion and what the next steps are for both the customer and for our team. This could include any action items or tasks that need to be completed, as well as any follow-up meetings that need to be scheduled. |   |   |
|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |   |   |   |   | [**© TemplateLab.com**](https://templatelab.com/) |   |