

Industry Meeting Preparation & Follow-Up Worksheet

Meeting Information

Meeting Title / Purpose: _____

Meeting Date: _____

Meeting Time: _____

Location / Platform: _____

- In Person
- Phone Call
- Video Meeting
- Conference / Convention
- Venue Meeting
- Production Meeting
- Partnership Discussion
- Other: _____

Organizations & Participants

Name	Role / Organization	Contact Information

Meeting Objectives

Primary Goals

Information Needed

Decisions To Be Discussed

Preparation Checklist

Before the meeting:

- Professional bio updated
- Resume / portfolio updated
- Website links verified
- Social media reviewed
- Presentation materials prepared
- Budget information prepared
- Technical documents prepared
- Contracts reviewed if applicable
- Questions prepared in advance
- Contact information organized
- Meeting location confirmed
- Transportation planned
- Devices charged

Materials Brought / Prepared

Material	Prepared
Business Cards	<input type="checkbox"/>
EPK / Press Kit	<input type="checkbox"/>
Resume	<input type="checkbox"/>

Portfolio	<input type="checkbox"/>
Technical Rider	<input type="checkbox"/>
Budget Documents	<input type="checkbox"/>
Contracts	<input type="checkbox"/>
Release Materials	<input type="checkbox"/>
Presentation Deck	<input type="checkbox"/>
Project Timeline	<input type="checkbox"/>

Discussion Notes

Key Topics Discussed

Questions Asked During Meeting

Important Responses / Feedback

Opportunity Tracking

Opportunity	Next Step	Deadline

Follow-Up Action Tracker

Follow-Up Item	Responsible Party	Due Date	Completed
Send Additional Materials			<input type="checkbox"/>
Schedule Next Meeting			<input type="checkbox"/>
Submit Proposal			<input type="checkbox"/>
Provide Budget Information			<input type="checkbox"/>
Review Contract			<input type="checkbox"/>

Relationship & Contact Notes

Potential Long-Term Opportunities

Concerns Or Limitations Discussed

Future Collaboration Potential

Self-Review

Question	Completed
Arrived prepared	<input type="checkbox"/>
Communicated clearly	<input type="checkbox"/>
Asked thoughtful questions	<input type="checkbox"/>
Respected time limits	<input type="checkbox"/>
Presented materials professionally	<input type="checkbox"/>
Maintained realistic expectations	<input type="checkbox"/>

Follow-up responsibilities documented	<input type="checkbox"/>
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Post-Meeting Follow-Up

After the meeting:

- Thank-you communication sent
- Requested materials delivered
- Notes organized
- Contacts saved properly
- Deadlines added to calendar
- Follow-up dates scheduled
- Outstanding questions documented

Final Notes