**PROGRESS REVIEW MEETING PREPARATION**

**PRIOR TO THE PROGRESS REVIEW MEETING**

* ‘Progress review meeting client information pack’ 6.1 has been prepared and sent to the client, including:
* Letter accompanying progress review information pack
* Request form to update personal/financial information
* Progress review meeting client preparation guide
* Agenda for progress review meeting
* Meeting time and date has been agreed with the client
* Progress review meeting presentation slides have been personalised (if appropriate)
* Progress review meeting has been entered in team member calendars
* Meeting room reserved in CRM system/software

**ON THE DAY OF THE PROGRESS REVIEW MEETING**

* Team members involved to review ‘Guide to progress review meeting’ 6.2.2
* Welcome sign for the client to be displayed in reception area (if appropriate)
* Team member at reception desk to be briefed on client arrival
* Meeting room set up with appropriate furniture, technology, tools, agenda, notepads, pens and water