

CEI Client Quarterly Meeting

Company: _____

Client Name: _____

Please bring the following to your quarterly meeting:

- Employee reports (roster & roles)
- Financial statements (P/L & balance sheet)
- Recommended: cash flow statement

Please answer the following questions below and bring your answers to your quarterly meeting:

1. Were you able to achieve your goals from last quarter? If not, what prevented you from doing so?

2. What do you want to achieve in the upcoming quarter?

3. What obstacles do you see to achieving those goals?

4. Specifically, what can CEI help you with in the upcoming quarter?

