Client Contact Meeting

Sample Agenda Topics

These meetings are a way to build relationships with the client contact(s), to raise questions and visitor issues, and to determine ways to continually promote ombuds services. The following are not necessarily in a particular order but serve as a guide for things to cover when meeting with client contact(s).

- Ask for client updates
  - Any new initiatives? Leadership transitions? Other things the ombuds should be aware of?
- Explore how the ombuds team can support client contact/their teams/client more generally
  - "Are there any issues keeping you up at night that we can provide input or support on or just have on our radar as we seek to be most helpful in our work?"
- Share positive visitor stories/feedback
- Raise visitor issues that could use direction or support
- Raise timely patterns, trends, recommendations
- Explore ways that the ombuds team can continue to strategically promote the program
  - Who can we connect with? (HR, Comms and Marketing, DEI, ERG's, key leaders)
  - Any upcoming large meetings we could present at? (Committee, All-hands, Town Halls)
  - Workshops we can lead? (Look at current list of workshop offerings)
  - Articles that we could draft that would speak to a specific topic?
  - Newsletters we can be a part of?
  - Upcoming initiatives that we could be featured in?
  - Policies/procedures that we could be included in?
  - Websites we could be featured on?
- Clarify action items in advance of next meeting
  - If there are action items, please follow up the meeting with an email that outlines the actions (both for the ombuds and client contact(s)) and copy dhinojosa@mwi.org.
  - Please also add these to Chatter so the team remains updated and we maintain a record of communication/actions with the client.

Please send suggestions for improving this document to ombuds-team@mwi.org.