Hi client name,

Thank you for taking the time to meet with us today. We are excited to start this project with you! Please find a recap of our meeting below:

1. **Target Launch Date** – There is no set date in place yet. However, once we begin work on all projects involved we will be providing regular updates and projected timelines.
2. **Priorities** – We want to take our time in order to really focus on design & functionality for a successful project, while looking to improve community engagement.
3. **UX Consultation Meetings** – Provided we have the surveys back by the end of March, we can project to have the UX onsite meetings in mid-April
   1. **UX Meeting & Graphic Design attendance**– This meeting is best kept small—to your **core team** and whoever has the authority to sign off on the final wireframe of the site. So for each subsite, please be sure to have these team members carved out ahead of time as well.
   2. **Discovery packages** – Our UX team will send these over to you for all subsites & main site—please let them know if you have any questions.
4. **Site Content & Preparation** – In order to cut down on the content preparation phase, it is best to start thinking about your content and updating any old content now. You will also be receiving content strategy training by Martin Lind.
5. **Graphic Design assets** – Please upload (you or your content coordinator) any assets (images, logos in vector format such as .ai, .eps, etc., style guides, branding guidelines) to the Box folder. We will be sending an invite shortly.
   1. Please provide me names and emails of the people who should be invited to the main site folder as well as those for the subsites.
6. **Meetings to be Scheduled** – We discussed conducting a 1-1.5 hour CMS demo and also scheduling a separate kick-off call for all advanced subsite stakeholders.
7. **Contact Information** –

PM’s contact information:

* 1. Phone: 310-656-3100 x 000
  2. Email: [email@visioninternet.com](mailto:email@visioninternet.com)

**Deliverables Summary:**

1. Please place the heatmapping codes sent over by the UX team on your current site & subsites
   1. They will be requesting access to analytics so we can begin collecting data
2. We project a deadline for survey feedback on or before date
   1. Along with projected graphic design assets to Box folders on or before date
3. Please provide a list of those who will need access to the Box folders to upload assets
4. Let us know when a good time would be to schedule the CMS demo & 2nd KO call within the next week

Please let us know if you have any questions about the above items.

Thank you,

PM