Turning 'Checked-out' Into 'Tuned-in'

Fast Frameworks To Skyrocket Client Engagement

You can't expect wiz-bang client engagement from a willy-nilly meeting structure

Today more than ever, clients have sky-high expectations of consultants and vendors. They demand highly personalized engagements that drive value quickly. They're eager to contribute and collaborate, but keeping everyone engaged and aligned is a challenge.

Meanwhile, the hybrid work environment brings a whole new level of complexity to building and sustaining client relationships.

No matter what role you play in the client relationship, you're tasked with creating a cohesive, engaging, personalized experience that drives value — from new client discovery and user interviews to workshops, meetings, and presentations.

No pressure, right?

It's time to give your client engagements a digital-first refresh.
Use this cheat sheet to make your client collaboration more engaging and productive — without reinventing the wheel.

What's inside?

This cheat sheet is a resource to keep in your back pocket (or your downloads folder) for client meetings. It includes practical tools and tips that you can plug into your existing process to bring a new layer of interactivity to your client engagements.

Part 1:
Online workshop best practices

Get pro tips to take your digital meetings and workshops to the next level.

Part 2:
Client meeting checklist

Use this checklist to quickly prepare for (and follow up after) each client meeting.

Part 3:
Templates

Kickstart client collaboration with premade templates built for consultants and client-facing teams.

Part 1:

Online workshop best practices

Get simple, actionable tips for overcoming some of the most common client collaboration challenges.

Challenge		Troubleshooting tips
Trust and psychological safety	Building trust with new clients takes time, but it's critical to get them comfortable with collaborating and speaking up.	Open meetings with an icebreaker or warmup to get everyone comfortable.
		If people are hesitant to speak up, allow them to contribute ideas anonymously at first.
Meeting and workshop participation	Awkward silences, low energy, and unequal participation make it hard to get to the root of your clients' needs and collaborate productively.	Accommodate different working styles by diverging to brainstorm, collect data, or work solo — then converging to collaborate and make decisions.
		Encourage active participation by having attendees collect notes, images, ideas, and questions in one shared space.
		Do an energizer activity to boost energy partway through the meeting.
Driving alignment and understanding during meetings	When you rely solely on verbal communication, things can get lost in translation, leading to misalignment.	Show, don't just tell. Use a visual thinking canvas with sticky notes, icons, images diagrams, and/or frameworks to get everyone on the same page.
		Use dot voting to solicit feedback and collaboratively make decisions.
Facilitation logistics	Remote meetings bring an additional layer of complexity — you need to juggle technology, leading activities and discussions, keeping track of time, and maintaining engagement.	Split duties with a co-facilitator or moderator.
		Use collaboration software that integrates with your video call platform so you don't need to switch back and forth between apps.

Challenge		Troubleshooting tips
Staying aligned between meetings	It can be hard to keep everyone engaged and aligned between meetings, especially in a remote or hybrid work environment.	Create a single source of truth for project updates, timelines, and documents — a virtual command center that's more accessible and collaborative than a project management platform.
		Provide prework to get everyone on the same page before a meeting or workshop.
		Maintain momentum with asynchronous work. Not everything needs to happen in real time.
		Track everyone's action items in one place to create clarity and transparency.

Part 2:
Client meeting checklist

Use this checklist to prepare for, facilitate, and follow up after meeting with your clients.

Before

☐ **Determine the target outcome**

Determine what you want out of the meeting, and identify the best method for achieving your goal in a creative and productive way. You can get inspiration from popular methods like Agile, design thinking, and the LUMA System. (See part 3 of this cheat sheet for templates to get you started!)

☐ **Assign prework**

Consider assigning prework to maximize the team's time together.

☐ **Structure your digital meeting space**

Keep multiple parts of your meeting or workshop in one place, like a digital canvas in Mural. Organize the canvas into structured sections and activities, with space for Q&A and note-taking so no one feels like they need to interrupt the flow of conversation to raise a point.

☐ **Timebox everything**

Break down your methods into small chunks (5–10 minutes) and set a timer to keep the process focused.

During

☐ **Go digital-first**

Level the playing field by having everyone dial in on their own device, even if some team members are in the same building.

☐ **Turn on webcams**

Request (but don't require) that all participants turn on their webcams to allow for nonverbal communication.

☐ **Orient to tools**

If you're using specific technology to facilitate the meeting, get everyone comfortable with the basic features and functionality before getting started.

During

☐ **Warm up**	Start with a warmup or icebreaker to boost energy, spark creativity, and build connection.
☐ **Direct traffic**	Turn-taking is more difficult in remote settings. Call on participants one at a time. Use a list of attendees or have each person nominate the next one to share out.
☐ **Encourage active participation**	Have attendees collect notes, images, ideas, sketches, and questions in one shared space — e.g., a digital canvas in your Mural workspace.
☐ **Define next steps**	Before the meeting ends, agree on and document next steps, including key dates and ownership for each task.

After

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☐ **Organize the output**	Clearly label your notes, slides, and/or mural from the meeting. Organize them in a central folder so everyone knows where to look when they need to refer to a past session.
☐ **Follow up**	Avoid workshop amnesia by following up promptly. Send attendees an email with next steps, the session recording, and other documentation from the meeting.

Part 3:
Templates

When you don't spend every meeting onsite with a client, it can be hard to drive change and introduce new methodologies. Templates can help.
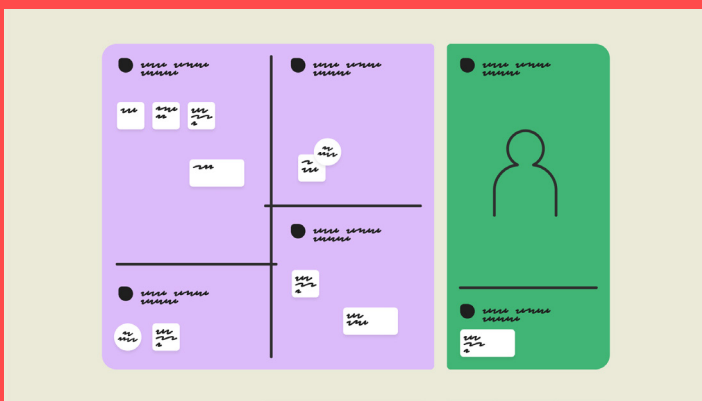
Use these templates as guides to save you time, scale best practices, and inspire your own creativity. They're completely customizable — once you copy one, it's yours to modify and adjust. Add your own agenda, methods, and unique point of view to make it work for your clients.
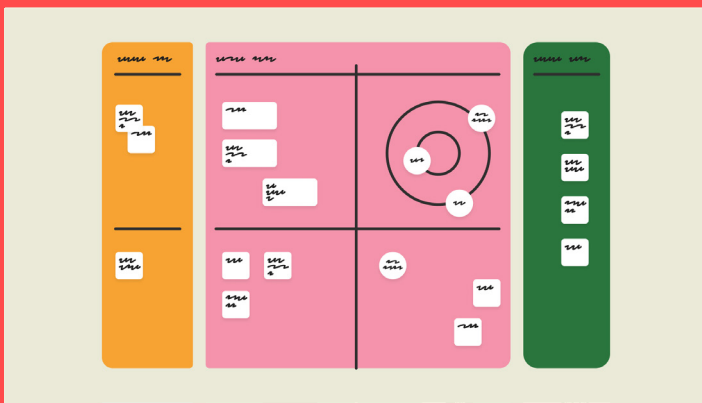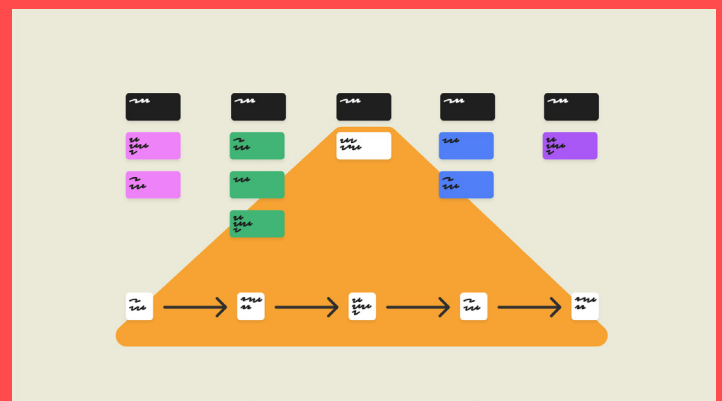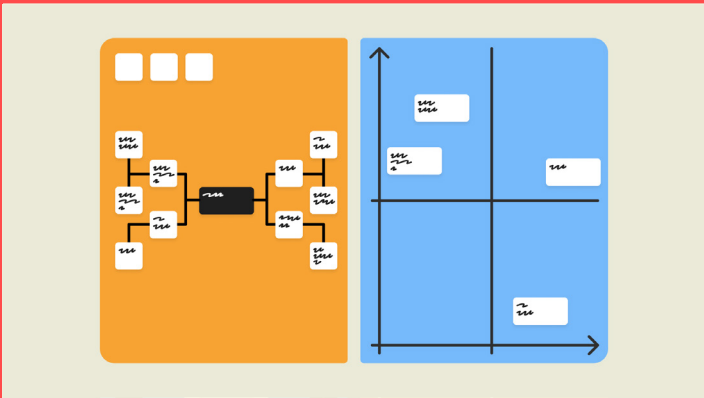
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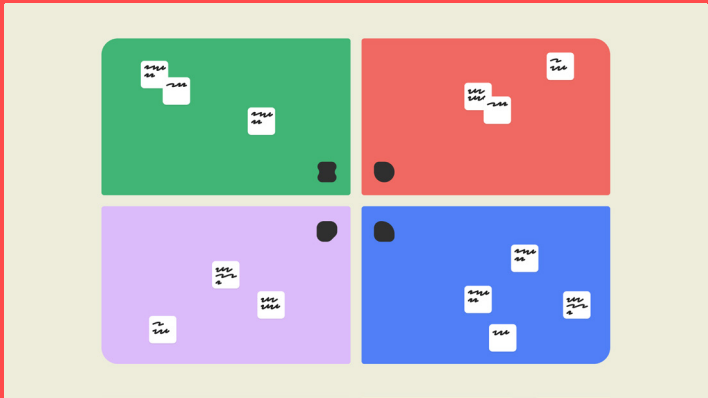by Somersault Innovation
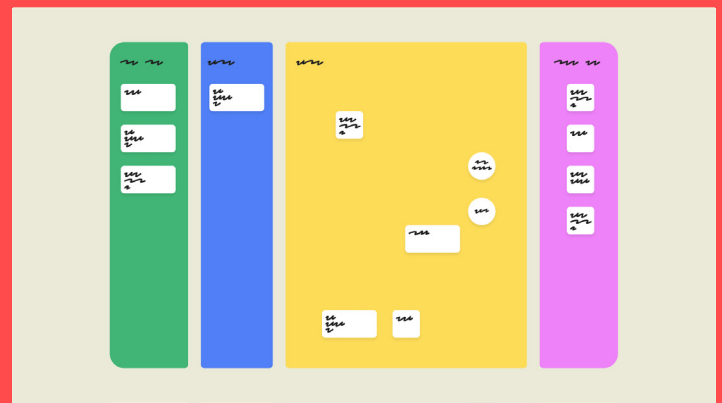
Meeting Notes

Persona Profile
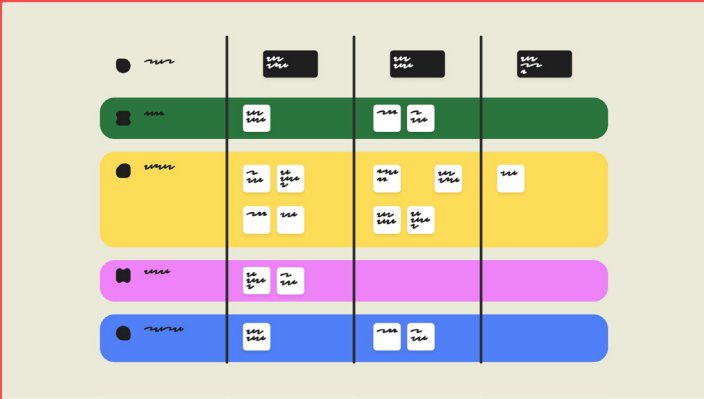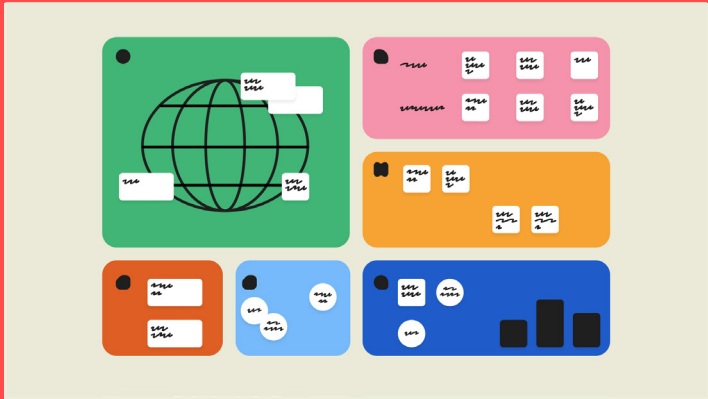by Accenture Interactive NL

SIPOC Diagram

Stakeholder Mapping
by Somersault Innovation

SWOT Analysis

User Journey Mapping
by Accenture Interactive NL

Warmups and Energizers

Explore all templates

Mural for client meetings

Discover digital-first visual collaboration with Mural — a space to work together visually with an easy-to-use digital canvas called a mural. With Mural's free plan, consultants and client-facing teams solve client challenges faster by facilitating engaging discovery, alignment, and feedback sessions in one shared digital workspace.

Visitor links
Give clients easy, no sign-up access to your mural. All Mural plans include unlimited visitors.

Custom toolbar
Limit the features clients can access to keep everyone focused, especially if they're new to visual collaboration.

Presentation mode
Present information on the same canvas you use to collaborate on methods and activities later in your meeting.

Timer
Timebox activities and keep the agenda on track.

Summon
Bring everyone back to the same space on the canvas.

Voting
Quickly and anonymously make decisions as a group.

Private mode
Temporarily hide new contributions to the mural to encourage authenticity and avoid groupthink.

Templates
Jumpstart collaboration and scale what's working. Choose from hundreds of premade templates or create your own.

Get started, free forever