ACME Corporation

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MEETING MINUTES

MEETING DETAILS

Meeting Title	Client Onboarding - Meridian Financial	Meeting Type	Client meeting
Date	2025/02/14	Next Meeting	2025/02/21
Start Time	02:00 PM	End Time	04:30 PM
Location	Virtual - Microsoft Teams	Status	Completed
Organizer	Amanda Torres	Confidential	false

SUMMARY

Conducted the initial onboarding session with Meridian Financial Group's implementation team. Reviewed project scope, timeline, and key milestones. Covered security requirements and compliance considerations for the banking platform.

KEY DECISIONS

1. Weekly check-ins every Friday 2-3pm EST
2. Meridian to provide API credentials by Feb 20
3. Staging environment setup by Feb 28
4. UAT period: March 15 - April 5

ATTENDEES

Name	Role	Department	Email
James Whitfield	VP Engineering	Engineering	j.whitfield@company.example
Sophie Williams	Head of UX	Design	s.williams@company.example
Marcus Whitley	CEO	Executive	m.whitley@company.example
Robert Kim	Enterprise Account Executive	Sales	r.kim@company.example

ACTION ITEMS

#	Action Item	Assigned To	Due Date	Priority	Status
	Send weekly check-in calendar invites to Meridian team	Amanda Torres	2025/02/15	High	Completed
	Set up staging environment for Meridian integration	James Whitfield	2025/02/28	Critical	Completed
	Document compliance requirements for banking platform	Oliver Zhang	2025/02/25	High	Completed

These minutes were recorded by the meeting organizer. Please review and submit corrections within 48 hours.

Prepared by: Amanda Torres