CARSON COACHING

Sample Team Meeting Agendas

Daily Check-In Agenda: 10-15 minutes

- Action Items completed/not completed yesterday
- Assign action items for today and tomorrow
- "Awareness Review" for next 5 days
  - Client meetings
  - Prospect meetings
  - Events
  - Deadlines

Weekly All-Team Meeting Agenda: 30-60 minutes

- Personal and professional check-in
- Team KPI review
  - Total AUM
  - Net New Assets YTD
  - New clients YTD
  - Referrals received YTD
  - # meetings scheduled this week
- Important company and client updates
- Project and goal updates
- Updates from last week's WWW
- Client success stories
- Action items in preparation for upcoming prospect and client meetings
  - Contact other professionals, get updated trust or insurance documents
  - Send draft agenda to clients for review and feedback from clients

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» Discuss upcoming firm events or travel by team members, including coverage needed

» Open the meeting up to challenges team members are having so that others can offer help or perspective

» Discuss timely tips - something that is working especially well or something useful you learned that will help everyone else, e.g.:

  – Something new about online or back office systems

  – New resource someone found

  – New line or approach that resonated with a client or prospect

» Recap: WWW (Who is doing What by When)

Weekly Leadership Team Meeting: 30-60 minutes

» Firm-level KPI Updates

  – Total AUM

  – Net New Assets YTD

  – Revenue YTD

  – New clients YTD

  – Referrals received YTD

  – New prospects YTD

  – Opportunities in pipeline ($)

» Important firm updates and announcements

» Updates on quarterly goals/strategic projects

» Updates from last week's WWW

» Departmental updates

» Roadblocks/challenges

» Opportunities

» Wrap up: WWW (Who is doing What by When)

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Weekly Operations Team Meeting: 30-60 minutes

- Personal and professional check-in
- Team KPI review
  - # open service cases
  - Average service case handle time
  - % clients overdue for reviews
  - NIGO % (% of submitted paperwork that was returned not-in-good-order)
- Firm-level updates, announcements, and KPIs
- Team project and goal updates
- Updates from last week's WWW
- Daily operations
  - Overdue tasks/service items and plans to complete
  - Client service issues to be aware of – either widespread or individual clients (1099 errors, client ACH problem, etc.)
  - Areas where assistance/decisions are needed from others – either other ops team members or advisors
  - Upcoming client appointments and prep items needed (paperwork, reports, etc.)
  - Upcoming PTO and travel -- coverage needed
- Recap: WWW (Who is doing What by When)

Weekly Advisor Team Meeting: 30-60 minutes

- Personal and professional check-in
- Team KPI review
  - Net New Assets YTD
  - New clients YTD
  - Referrals received YTD
  - Closing ratio YTD
  - New prospects YTD
  - Opportunities in pipeline ($)
  - # meetings scheduled this week (client vs. prospect)
- Firm-level updates, announcements, and KPIs
- Team project and goal updates
- Updates from last week's WWW

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- Client success stories
- Market & economic talking points for the week
- Portfolio and investment management updates
- Week ahead
  - Overdue tasks and plans to complete
  - Upcoming prospect meetings and opportunities
  - Upcoming client reviews
  - Upcoming events
  - Areas where assistance/decisions are needed from others – either other ops or marketing
- Recap: WWW (Who is doing What by When)

Weekly Marketing Team Meeting: 30-60 minutes

- Personal and professional check-in
- Team KPI review
  - PR mentions
  - Leads generated last week/YTD
- Firm-level updates, announcements, and KPIs
- Team project and goal updates
- Updates from last week's WWW
- New resources and idea sharing
- Daily activities
  - Overdue tasks/service items
  - Areas where assistance/decisions are needed from others – either other ops or advisors
  - Upcoming events
  - Upcoming PTO and travel -- coverage needed
- Recap: WWW (Who is doing What by When)