

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

- » 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)

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

- » 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)

