Weekly Team Meeting Agenda

**UPCOMING CLIENT MEETINGS**

* Upcoming Review Meetings with Existing Clients
  + Confirm all meeting preparation and client deliverables
  + Status of New Accounts, Transfer-ins, and other business
  + Meeting Follow Up, KYC, Administration, etc.

**UPCOMING PROSPECTIVE CLIENTS**

* Upcoming Meetings with Prospective New Clients
  + Confirm all meeting preparation and client deliverables
  + Status of New Accounts, Transfer-ins, and other business
* Upcoming Meetings with Strategic Partners/Centers of Influence
* Other New Business Opportunities

**ONGOING CLIENT EXPERIENCE**

* + Client Profiling & Moments of Truth
  + Client Birthdays & Milestones Coming Up
  + Relationship Calls
  + Other Timely Client Touches (Thanksgiving, Annual Anchor, etc.)
  + Upcoming Client Events
  + Newsletter
  + Client Feedback & Service/Operational Observations

**TEAM DEVELOPMENT & OPERATIONS**

* + Team Check-In (Task Lists, Projects, etc.)
  + Technology Updates
  + Upcoming Training, Courses, and Conferences
  + Holidays and Other Absences

**OTHER IMPORTANT INITIATIVES**

* + Documenting Processes for the Procedure Manual
  + Client Conversion to Paperless Statements (or other projects worked on)

**NEW ITEMS FOR DISCUSSION**