

Weekly Team Meeting

1. **Current Client Update - Meetings**
	1. Upcoming Review Meetings with Existing Clients
		* Confirm all meeting preparation and client deliverables
		* Status of New Accounts, Transfer-Ins and other business
	2. Upcoming Meetings with New Clients
		* Confirm all meeting preparation and client deliverables
		* Status of New Accounts, Transfer-Ins and other business
2. **New Business Pipeline**
3. Upcoming Meetings with Prospective New Clients (FIT Meetings & Calls)
	* + Confirm all meeting preparation and deliverables
4. Upcoming Meetings with our Strategic Partners/Centers of Influence
5. Other New Business Opportunities
6. **Progress Report**
	1. Business Metrics compared to Targets & Goals
7. **The Client Experience**
	1. Client Profiling & Moments of Truth
	2. Client Birthdays & Milestones Coming Up
	3. Call Rotations
	4. Other Timely Client Touches (Thanksgiving, Annual Anchor, etc.)
	5. Upcoming Client Events
	6. Newsletter
	7. Client Feedback & Service/Operational Observations
8. **Team Operations**
	1. Team Check-In (Task Lists, Projects, etc.)
	2. Technology Updates
	3. Upcoming Training, Courses and Conferences
	4. Holidays and other absences
9. **Other Important Initiatives**
	1. Documenting Processes for the Procedure Manual
	2. Client Conversion to Paperless Statements
10. **New Items for Discussion**