

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**