

Weekly Team Meeting Agenda

You've set your vision and goals for the business, now it's time to focus on the priorities that will lead to your success. Weekly team meetings are more than just a check-in; they are an integral part of your annual planning process. The following process will ensure team meetings are a natural extension of the annual goals and quarterly priorities set in your annual launch plan.

- **FOLLOW YOUR ANNUAL LAUNCH PLAN**

Weekly huddles should focus on your priorities for the quarter, setting clear next steps to keep you moving forward, and identifying and resolving issues and challenges that stand in the way of you achieving your goals.

- **SET A CONSISTENT TIME**

Consistency is key. Set a weekly time that is regular to hold these meetings. Generally, it is best to avoid Monday mornings (when team members can be at their most productive), as well as early morning or end-of-day meetings. Find a time that works best for you.

Stick to the time allotted, and do not start meetings too late if any of your team members work remotely/are in different time zones.

- **SET THE AGENDA IN ADVANCE**

Allowing team members to prepare for and give input on the agenda content is key. A simple one-page agenda for teams works great, but you can also set up project management tools with meeting templates, which can help track projects and tasks as a whole.

- **FOCUS ON A COLLABORATIVE MEETING**

Verbalize that this meeting is a time for everyone to come together and understand any needs/issues, as well as celebrate successes. Everyone's ideas are valued and respected. To stay focused and ensure a collaborative meeting, make sure the priorities and issues discussed are those that impact the entire team.

Weekly Team Meeting Process

MEETING DATE: EVERY MONDAY AT 11 AM – 12 PM

MEETING PREP – END OF DAY FRIDAY

By end of day Friday, team members update the Weekly Huddle Agenda in preparation for the Monday meeting

- Add any weekly win or shout out, these can be your own or for someone else
- Update the status to reflect if a priority is On Track, Issues to discuss, or Significant issues, deadline in jeopardy
- Each team member adds their most critical issue for discussion to Top Issues and remaining issues to Remaining Issues

DURING THE MEETING

- The meeting will start on time even if all team members are not present
- Be respectful, curious and work collaboratively to solve issues
- Team members are responsible for capturing their own next steps
- Meetings end on time, any remaining issue not discussed will be discussed in the next meeting or should be address in our 1:1 meetings

AGENDA

- Priorities status check (On Track, Issue, Warning) – 5 min
- Top Issues (1 per team member) – 30 min
- Remaining Issues (everyone else) – 25 min

FOLLOWING THE MEETING

- Team members note their tasks with due dates by end of day

Weekly Team Meeting Sample Meeting

KICK-OFF & PRIORITIES STATUS CHECK

Start with one weekly win or shout out, then review status of current quarter keystone priorities by team member.

Status: On Track, Issues to discuss, Deadline in jeopardy

Jim	a) New office space update b) Client transition plan c) Referral roadmap system	STATUS On Track Issues On Track
Seth	a) COI Touchpoint calendar b) Marketing firm c) Client fee analysis	Issues On Track On Track

TOP 3 ISSUES

Review status of top 3 most pressing issues to be resolved

- Marketing firm: Taylor Designs or Be Svelte?
- Client transition list is behind schedule
- New office: parking situation?

REMAINING ISSUES

Discuss remaining issues and priorities

- Holiday schedule & Jim out 3 weeks in Jan.

MY NEXT STEPS

1. Follow up with Taylor Designs with decision to move forward
2. COI Touchpoint calendar approved, set implementation tasks