Weekly Team Meeting

1) **Current Client Update - Meetings**

   a) Upcoming Review Meetings with <u>Existing</u> Clients
      - Confirm all meeting preparation and client deliverables
      - Status of New Accounts, Transfer-Ins and other business

   b) Upcoming Meetings with <u>New</u> Clients
      - Confirm all meeting preparation and client deliverables
      - Status of New Accounts, Transfer-Ins and other business

2) **New Business Pipeline**

   a) Upcoming Meetings with <u>Prospective</u> New Clients (FIT Meetings & Calls)
      - Confirm all meeting preparation and deliverables

   b) Upcoming Meetings with our Strategic Partners/Centers of Influence

   c) Other New Business Opportunities

3) **Progress Report**

   a) Business Metrics compared to Targets & Goals

4) **The Client Experience**

   a) Client Profiling & Moments of Truth
   b) Client Birthdays & Milestones Coming Up
   c) Call Rotations
   d) Other Timely Client Touches (Thanksgiving, Annual Anchor, etc.)
   e) Upcoming Client Events
   f) Newsletter
   g) Client Feedback & Service/Operational Observations

5) **Team Operations**

   a) Team Check-In (Task Lists, Projects, etc.)
   b) Technology Updates
   c) Upcoming Training, Courses and Conferences
   d) Holidays and other absences

6) **Other Important Initiatives**

   a) Documenting Processes for the Procedure Manual
   b) Client Conversion to Paperless Statements

7) **New Items for Discussion**