

Weekly Team Meeting Guidelines

Purpose

A weekly team meeting is an efficient and effective method to ensure everyone on the team understands the common goals and activities of your business for the coming week, month and year. It provides a structured forum for reinforcing new business practices, fostering a proactive business model, preventing 'slippage' (things falling through the cracks) and bringing order and structure to your team.



Benefits

The weekly team meeting will allow you and your team to experience the following:

- Minimized interruptions throughout week, allowing everyone to be more focused and on task
- Clearly outline client-specific deliverables for the week. This ensures a proactive approach (ie. all necessary preparation done ahead of time), as well as keeping everyone on the same page
- Report on the status of 'new' and 'existing' client transfers
- Create a structured forum for sharing and recording client-specific information such as birthdays, Client Profiling and other information such as upcoming client holidays, etc.
- Reinforce your team's priority Advocate Service elements for the week and month ahead
- Stay focused on business development projects – monitoring their status from inception through to completion
- Create a venue for monthly progress reporting of new clients, new assets and average account size
- Be fully aware of upcoming staff training, holidays or other issues that may affect the day-to-day operations of the business