

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 focussed and on task.
- Clearly outline client-specific deliverables for the week ensuring 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 of client-specific information such as birthdays, FORM 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.
- Refer to the Implementation instructions in the next column.



Weekly Team Meeting Guidelines

Implementation

Choose a weekly day and time to meet that is convenient to everyone.

- The beginning of the week tends to work well for many Advisors and their staff.
- Fridays are generally not recommended due to days off, early departures, other meetings, etc.
- Book the team meeting into everyone's organizer as a reoccurring commitment over the long-term.
- Do not skip the meeting due to one team member's absence (unless you are a team of two).
- Use a Weekly Team Meeting Agenda (refer to sample Agenda provided on next page) to ensure your meetings are efficient and effective. Agendas ensure everyone stays on task and all that needs to be communicated amongst team members is covered in a timely manner.
- Make sure everyone has a copy of the Agenda at the outset of each meeting. It is the same Agenda each time, so this is easy to facilitate.
- Come prepared to the meeting.
- Each attendee must be up-to-date with respect to the areas of business operations they are responsible for.
- Make sure you have a meeting facilitator.
- Keep things short and concise. These meetings shouldn't take any longer than 30 minutes to complete.
- Consistency will be important in forming and reinforcing your new structured approach to team communication.