Weekly Team Meeting Implementation

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

    - The beginning of the week tends to work well for many Financial Advisors and Assistants.

    - Fridays are generally not recommended due to days off, early departures, other meetings, etc.

2. Book the Weekly Team Meeting into each of your organizer's as a reoccurring commitment over the long-term.

    - Do not skip these meetings – commit to them.

3. Use a Weekly Team Meeting Agenda (refer to sample Agenda provided on next page) to ensure your meetings are efficient and effective. Agenda's ensure everyone stays on task and all that needs to be communicated amongst team clients 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.

4. Come prepared to the meeting.

    - Each of you must be up-to-date with respect to the areas of client servicing and operations you are responsible for.

5. Keep things short and concise.

    - These meetings shouldn't take any longer than 30 minutes to complete.

6. Consistency will be important in forming and reinforcing your new structured approach to team communication.