**Quarterly Strategic Meeting Agenda**

1. **TARGETS & GOALS REPORTS**

* + - * 1. Actual number of referrals and new clients received over the quarter

From Existing Clients

From the Financial Planner

From the Branch

From Our Strategic Partners

* + - * 1. Update on current level of all “high level” clients.
				2. Actual versus projected production year-to-date.
				3. Actual versus projected assets under administration year-to-date.
1. **CLIENT EXPERIENCE INITIATIVES**
	1. Review and discuss upcoming or new Client Experience initiatives:
		* Review Meetings
		* Call Rotations
		* Moments of Truth
		* Thanksgiving
		* Newsletters
		* Other
	2. Share feedback and success stories about well-implemented client service delivery.
	3. Discussion & brainstorm any challenges or obstacles regarding ongoing client service delivery and/or operations.
2. **ONGOING ANNUAL BUSINESS ASSESSMENT**
	1. Review of Annual Strategic Plan to determine:
		* Items completed
		* Revised accountabilities
		* New Action Items required
3. **PROFESSIONAL DEVELOPMENT & OTHER**
	1. Identify meaningful training opportunities, as and when appropriate.
	2. Identify additional credentials and designations you wish to pursue.
	3. Review upcoming travel, conferences, holidays, etc. for the next quarter.