**Quarterly Strategic Meeting Agenda**

1. **TARGETS & GOALS REPORTS**

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

From the Branch

From Existing Clients

From Our Strategic Partners

* + - * 1. Update on current level of all “A” clients.
        2. Results from current & future right-sizing efforts.
        3. Actual versus projected revenue year-to-date.
        4. 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
      * Delegation of new Action Items and establish time frame for completion
3. **PROFESSIONAL DEVELOPMENT & OTHER**
   1. Identify meaningful training opportunities, as and when appropriate.
   2. Identify additional credentials and designations you or someone on the team wishes to pursue.
   3. Review upcoming travel, conferences, holidays, etc. for the next quarter.