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 managing your clients 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.

Special Notes

A special note to Advisors working with Assistants who are part-time or shared with another Advisor: choose the day and time of week very carefully to avoid typically busy times as well as, minimize disruptions to other advisors who need access to the Assistant. In addition, using the Agenda will be key to keeping this meeting streamlined – making best use of everyone's time.

If your Assistant is at a distance, you can still hold the meeting via telephone and we encourage you to do so with the same regularity and consistency.

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 ensuring a proactive approach (i.e. 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 for the Client Experience 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.