**Weekly Team Meeting Agenda**

1. **CURRENT CLIENT UPDATE - MEETINGS**
   1. Upcoming Review Meetings with Existing Clients
      * Confirm all meeting preparation and client deliverables
      * Status of New Accounts, Transfer-Ins and other business
   2. Upcoming Meetings with New Clients
      * Confirm all meeting preparation and client deliverables
      * Status of New Accounts, Transfer-Ins and other business
2. **NEW BUSINESS PIPELINE**
3. Upcoming Meetings with Prospective New Clients (FIT Meetings & Calls)
   * + Confirm all meeting preparation and deliverables
4. Upcoming Meetings with our Strategic Partners/Centers of Influence
5. Other New Business Opportunities
6. **THE CLIENT EXPERIENCE** 
   1. FORM for Clients
   2. Moments of Truth
   3. Call Rotations
   4. Thanksgiving
   5. Other:
   6. Client Feedback & Service/Operational Observations
7. **TEAM OPERATIONS**
   1. Team Check-In (Task Lists, Projects, etc.)
   2. Technology Updates
   3. Upcoming Training, Courses and Conferences
   4. Holidays and other absences
8. **OTHER IMPORTANT INTIATIVES**
   1. Documenting Processes for the Procedure Manual
   2. Client Conversion to Paperless Statements
9. **NEW ITEMS FOR DISCUSSION**