






EVOLVE

Team Meeting Structure Best Practices



| MEETING TYPE | CHARACTERISTICS | OBJECTIVE | WHAT SHOULD BE COVERED IN THIS MEETING? |
|---|---|--|---|
|  Daily Huddle | <ul style="list-style-type: none"> 10 to 15-minute standup Should happen first thing in the morning or the last thing in the afternoon Each team member only gets 2 to 3 min (someone should measure time) | <ul style="list-style-type: none"> Primary Objective is to increase team awareness This meeting is not to solve problems or brainstorm ideas The meeting should keep each other in the loop of what is going on today and what happened yesterday | <ul style="list-style-type: none"> Cover critical tasks and immediate 'to do's'. i.e., things needed to prepare for client appointments, immediate post meeting tasks, inform of reactive problems/resolution - just to let the team know it's going on and who has ownership This is not to brainstorm how to fix them |
|  Weekly Collaborative Meetings | <ul style="list-style-type: none"> 1 hour on team structure items and any issues that need to be discussed Have a consistent weekly meeting owner who drives the agenda, runs the meeting, captures tasks | Strategy implementation Work on team structure and on strategies around: <ul style="list-style-type: none"> Business Development Client Engagement Solutions and Insights Human capital (team member development) | <ul style="list-style-type: none"> Processes and systems project work/report out Structure-project work/report out Execution and implementation - project work/report out More in-depth problem resolution Client meeting prep Post client meeting execution |
|  Weekly Principal meeting | <ul style="list-style-type: none"> 1 hour - Principal should meet to share business philosophies and agree on priorities Eventually this can be monthly | <ul style="list-style-type: none"> To keep priorities aligned and aid legacy knowledge transfer Agenda is needed | <ul style="list-style-type: none"> Work flow assignments Review of staff performance Review of Wealth Planning questions and processes |
|  Quarterly Development meetings | <ul style="list-style-type: none"> 1 to 1 ½ hour 1-on-1 between team leader and team members Could also be between team members to share expertise and philosophies or to begin to create strategies and projects for implementation | Use a roadmap to look out 1 year Consider having some pre-planned topics: <ul style="list-style-type: none"> Strategy development Competency development Performance and/or milestone analysis (team, client etc.) Process, systemization and Implementation plan creation Implementation checkpoints | <ul style="list-style-type: none"> Work on training with team members in: Value Proposition Investment review and mgmt. process Team member expectations Client communication techniques Team communication expectations Accountability structure /Implementation strategies **during team formation, this work may need to be incorporated into weekly team meetings to move formation process along faster |
|  Annual Strategic Planning meeting | 1 day offsite, that includes all team members should have some team building activity or social time at the end of the meeting-potentially inviting spouses | Offsite that includes business and pleasures should incorporate, planning, reflection and celebration | <ul style="list-style-type: none"> Review of last year- what worked and what didn't Goal review SWOT analysis Recognition Team building Planning for next year and beyond |

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