






# TEAM MEETING STRUCTURE BEST PRACTICES

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

## QUESTIONS?

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