

TIME TO PROFIT

Find the Right Team.
Have Them Do the Right Things.

Team Meeting Agenda Planning Template



Sales

- confirm sales calls for the week
- review any new clients to onboard

Marketing

- Status on newsletter for Jan 3
- Review Social media for the week
- JV promotion for Jan 9th.

Product Development

- Planning Program launch for April - webinar scheduled for March 3rd - review preview call campaign build out

Finance

- Susan M - Payment declined on Jan 1
- Review vendor payments

Service Delivery

- Group Program weekly call scheduled for Tuesday at 3pm. Are handouts complete? Is reminder scheduled?

Team

- Sonaya on vacation Feb 1 - 6th - confirm calendar is clear. Add hotel & air travel to calendar.

Sales

Marketing

Product Development

Finance

Service Delivery

Team