

MEETING AGENDA EXAMPLE

Meetings ensure a constant flow and monitoring of effective communication. Use a template like the one below to keep everyone on the same page and to clarify the objectives. The fields in red are for you to modify.

MEETING AGENDA

Date: **01/24/00**

Time: **9:00 – 10: 30 am**

Recurring: **Every Monday**

Type of meeting: *Weekly team meeting*

Facilitator: *Person running meeting*

Timekeeper: *Person keeping time*

Minutes/Notes taker: *Could be same as timekeeper*

Attendees: *All in attendance*

AGENDA ITEMS:

- Review last week minutes
- Outstanding items: *(Must be submitted by Friday at noon to be on agenda)*
 - *Segmentation project*
- New items: *(Must be submitted by Friday at noon to be on agenda)*
 - *Implementation training after tax season*
- Individual updates
- Review current week's calendar
- Review next week's calendar

INDIVIDUAL UPDATES:

Attendee 1 – capture crucial information in this space such as client updates, vacation schedule, conference attendance

IMPLEMENTATION

Action Item	Person responsible	Deadline
✓ <i>Junxure project</i>	<i>John</i>	<i>01/31/00</i>
✓		
✓		

MEETING AGENDA TEMPLATE 1

MEETING AGENDA

Date:

Time:

Recurring:

Type of meeting:

Facilitator:

Timekeeper:

Minutes/Notes taker:

Attendees:

AGENDA ITEMS:

- Review last week minutes
- Outstanding items:
 -
 -
- New items:
 -
 -
- Individual updates
- Review current week’s calendar
- Review next week’s calendar

INDIVIDUAL UPDATES:

IMPLEMENTATION

Action Item	Person responsible	Deadline
✓		
✓		
✓		
✓		
✓		

CLIENT MEETING AGENDA TEMPLATE 2

Time: _____

Date: _____

Location: _____

Agenda Topic: _____

PLANNING:

INVESTMENT REVIEW

What are your expectations or objectives for this meeting?