

Monthly management meeting agenda

1) Finance

- Review of profit & loss statement for previous month & year to date
 - 12-month cash flow - comparison of budget versus actual
 - Key Performance Indicators
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2 Marketing

- Return on Investment from marketing activities
 - Review leads, prospects, opportunities
 - Overall progress of marketing plan
 - Web site review
 - Online reviews
 - Social media connection and engagement
 - Direct marketing review
 - Client referrals
 - Testimonials and case studies
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3 The client experience

- Average ticket time
 - Lessons from escalation
 - Net Promoter Score review
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4 Operations

- Technical issues
 - Non-technical issues
 - Compliance issues
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5) People

- Review of team performance
 - Review of individual performance: Who's heading up, who's heading down
 - Training schedule
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6) Strategy review

- Tactics for growth
- Extending the profit matrix
- Daily 60-90 minutes working ON the business

