

## RPM CHAT AGENDA Weekly Session

Carving out regular quadrant ii time (important, not urgent) is essential for your team. With a thoughtful structure, it need not be a marathon meeting. Enter the RPM CHAT session: a weekly 30 minute status update to “rev” up your team for the week. You’ll face issues together, celebrate wins, uncover problems, brainstorm solutions and strategize for next week.

Click [here](#) for the wisdom behind this agenda.

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**Review** last week’s priorities. Each project is updated by the owner.

**Problems** that need to be fixed. Because everyone feels [safe](#), mistakes are openly discussed and embraced for team learning. The focus is on solutions, not finding who or what to [blame](#).

**Modifications** or something **Missing**. Everyone contributes suggestions to improve a process or develop a new approach to team handoffs, quality service or operational efficiency.

**Client** meetings often yield a new issue to deal with, either generalized or specific to the client. What did we learn last week, what needs to happen, and who is following up with the client?

**Help** someone on the team. If a team member is challenged by a particularly difficult project, the team brainstorms a way to overcome it.

**Acknowledge** a team member for going the extra mile, or for doing something extraordinary.

**Top priorities** for next week. Determine what gets on the priority list for next week and who owns it.

With very few exceptions, nothing gets tabled. With several heads focused on an issue, you find a way to implement simply and quickly. In [Scrum](#), an agile framework originally designed for software engineers, product design development is done in an iterative manner. Small amounts of work are done frequently and delivered to the client right away to get feedback as soon as possible. More frequent strategizing by multiple brains leads to better results, optimally achieved.

Meeting format and content inspired by the Bay Area team at [Hewins Financial Advisors, LLC](#)