

# Management meeting agenda template

Date

Time

Location

Attendees

## 1. Call to Order and Welcome

- Greetings and introduction of attendees
- Approval of the agenda

## 2. Review and Approval of Minutes

- Approval of previous meeting minutes
- Matters arising from the minutes

## 3. Financial Review

- Financial updates including actual, budgeted and forecast results
- Analysis of financial trends and risks
- Review of any financial challenges that need immediate attention

## 4. Performance Review

- Key performance indicators updates
- Review of performance against set targets
- Identification of gaps/shortcomings in performance and next steps towards improvement

## 5. Project Review

- Review of projects status
- Discussion of any new project requests, approvals, status updates or concerns
- Identification of potential improvements in project management

## 6. Employee Performance Review

- Performance reviews of the management team
- Recognitions, recommendations and feedback

## 7. Customer Review

- Discuss any updates or feedback from customers
- Discuss any customer concerns or complaints, and determine corrective action

## 8. Strategic Planning and Discussion

- Review of short and long-term goals, plans and initiatives
- Review of progress on previous strategic plans and plans for the future
- Brainstorming session, new ideas and/or suggestions

## 9. Any Other Business

- Discussion around any relevant topic or issue that concerns the management team or its processes

## 10. Action Items

- Listing of any agreed next steps and responsibilities
- Set timelines for action items

## 11. Closing Remarks and Adjournment

- Recap of meeting actions and tasks
- Schedule the date, time and venue for the next management meeting
- Conclusion of the meeting.