

WEEKLY MEETING AGENDA

[Business name] Weekly

Meeting	<i>Weekly operations</i>
Day and time	<i>Day, time</i>
Owner	<i>Role that runs the meeting</i>

Before the meeting: send the numbers and the stuck items the day before.

1 AGENDA

Time	Item	Owner	Notes
<i>0:00</i>	<i>Wins and numbers</i>	<i>Role</i>	
<i>0:10</i>	<i>What is stuck</i>	<i>Role</i>	
<i>0:25</i>	<i>Decisions needed</i>	<i>Role</i>	
<i>0:40</i>	<i>Next week</i>	<i>Role</i>	

2 DECISIONS

Decision	Owner	Date
<i>What was decided</i>	<i>Role</i>	<i>MM/DD</i>

Every decision gets an owner and a date. Everything else waits.

ORG CHART

[Business name] Roles

Name the role, not the person. People change. Roles stay.

Role	Reports to	Owns	Backup
Owner	—	Direction and exceptions	
Operations	Owner	Day-to-day delivery	
Sales	Owner	Pipeline and close	

RACI

[Business name] Who owns what

R = Responsible. A = Accountable. C = Consulted. I = Informed.

One A per process. The rest support. Add roles in the blank columns.

Process	Owner	Operations	Sales		
Weekly numbers	A	R	C		
Customer issue	A	R	C		
New hire	A	R	C		

HOW TO USE THIS KIT

Same rhythm every week.

The agenda, the org chart, and the RACI work together. The meeting runs on the agenda. The org chart shows who is in the room. The RACI shows who owns what.

- 1 Fill the org chart first.** Name the roles.
- 2 Fill the RACI.** One A per process. Add roles in the blank columns.
- 3 Send the numbers and stuck items the day before.** Then run the meeting on the agenda.
- 4 Log the decisions.** Owner and date. Everything else waits.

Works in Google Docs and Word. Free to use and adapt for your business.

EXAMPLE · WEEKLY MEETING AGENDA

Example Co. Weekly

Filled example for a made-up business. Replace it with your own.

Meeting	Weekly operations
Day and time	Monday, 9:00 to 9:45
Owner	Operations lead

Before the meeting: send the numbers and the stuck items the day before.

1 AGENDA

Time	Item	Owner	Notes
0:00	<i>Wins and numbers</i>	Owner	Revenue on track. Two new customers.
0:10	<i>What is stuck</i>	Operations lead	Packaging supplier is 10 days late.
0:25	<i>Decisions needed</i>	Owner	Switch suppliers or wait one more week?
0:40	<i>Next week</i>	Each owner	Top three priorities per role.

2 DECISIONS

Decision	Owner	Date
Switch packaging supplier	Operations lead	11/04
Post the second crew job	Owner	11/06

Every decision gets an owner and a date. Everything else waits.

Example Co. Roles

Name the role, not the person. People change. Roles stay.

Role	Reports to	Owens	Backup
Owner	—	Direction and exceptions	Operations lead
Operations	Owner	Day-to-day delivery	Owner
Sales	Owner	Pipeline and close	Owner
Bookkeeper	Owner	Invoices, payroll, cash report	Owner

EXAMPLE · RACI

Example Co. Who owns what

R = Responsible. A = Accountable. C = Consulted. I = Informed.

One A per process. The rest support. Add roles in the blank columns.

Process	Owner	Operations	Sales	Bookkeeper	
Weekly numbers	A	R	C	R	
Customer issue	A	R	C	I	
New hire	A	R	C	C	
Month-end close	A	I	I	R	