Finance Team Meeting

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A high-performing finance team should always have a pulse on the financial state of their business. Use this standing meeting agenda to keep the finance team aligned and prepared to tackle problems or capitalize on opportunities as they come up.

- [ ] How's everyone doing?

  Summary: Next Steps:

- [ ] Review financial plan vs. current state of the company

  Summary: Next Steps:

- [ ] Review financial plan vs. current state of our profit centers (marketing, sales, etc)

  Summary: Next Steps:

- [ ] How are we tracking against our goals?

  Summary: Next Steps:

- [ ] Idea gathering: How can we maintain or improve our financial performance?

  Summary: Next Steps:

- [ ] Any urgent or outstanding things we need to address this week?

  Summary: Next Steps:

Want meeting notes like this with no extra work?

With Hypercontext by Spinach, every meeting has a shared