

WEEKLY OWNER MEETING

Thirty minutes, same day, same time. Use it with your team or by yourself.

Date: Attendees:

- [ ] **Cash check**
  Cash in the bank, what is owed to you, what you owe this week.
- [ ] **Leads and sales**
  New leads, quotes out, jobs won and lost. Who needs a call?
- [ ] **Work in progress**
  What is being delivered, what is late, what is at risk.
- [ ] **Problems and complaints**
  Anything that went wrong, and who is fixing it.
- [ ] **This week's priorities**
  The three things that must happen.

Decisions made:

Actions (who, what, by when):



MONTHLY OPERATING REVIEW

Sixty to ninety minutes, once a month, after the books are up to date.

Month: _____ Attendees: _____

- [ ] **Money**
  Profit and loss, cash in weeks, receivables owed, reserve level.
- [ ] **Marketing**
  Spend, leads, close rate, cost per lead, cost per customer by channel.
- [ ] **Delivery**
  Capacity used, quality problems, repeat customers, reviews.
- [ ] **People and systems**
  Who is overloaded, what is broken, which procedure needs updating.
- [ ] **Next month**
  Goals, budget, and the one thing to fix.

What surprised us this month?

What will we change next month?

Actions (who, what, by when):