

# Appendix A: In-Person Group Meeting Agenda

## For a Content- or Activity-Focused Meeting

### Group Name + Date of Meeting

*ProVisors is a community of professionals who serve their clients as trusted advisors and share the highest standards of integrity, performance and accountability. ProVisors promotes and enables relationship-building, information-sharing and collaboration among its members for the benefit of their clients and one another. Know, Like, Trust and Refer.*

### Agenda *\*times are suggestions/approximations, assuming a morning meeting timeline*

<b>7:00*</b>	<b>Arrive &amp; Network</b>
<b>7:30</b>	<b>Housekeeping Reminders + EC Introductions</b> List your Executive Committee on the agenda (name + role) Each person will provide a brief intro + a brief networking tip (vary the tip topic monthly)
<b>7:35</b>	<b>Introductions + Testimonials</b> Determine how much time to allocate based on RSVPs Decide if you want to include a quick prompt/question for people to answer in their intro Proposed sequence: <ul style="list-style-type: none"><li>• Guests with testimonials for a group member will go first: intro + testimonials</li><li>• Any member with testimonials will go next : intro + testimonials</li><li>• Anyone who hasn't yet spoken will go: intro</li><li>• Candidates will go last: intro</li></ul>
<b>8:25</b>	<b>Panel/Presentation/Activity</b>
<b>8:50</b>	<b>Needs/Deals/Wants + Troika Assignments</b> Include a list of the open seats you're recruiting for on the agenda
<b>9:00</b>	<b>End Meeting</b>

### Upcoming ProVisors Events

List any social events, Affinity Groups. or other Regional Groups' meetings.

