

Appendix B: Virtual 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*

7:00*	Fun & Games Icebreaker/Networking Activity
7:30	Meeting Kick-Off <ul style="list-style-type: none"> • Read/reference mission statement • Share ground rules or housekeeping reminders for meeting conduct • Share a slide with the names/groups of any guests (if too many to introduce) • Quick group photo
7:35	EC Introductions – moderated by GL 60 seconds each, ideally with a key group update relevant to their role <ul style="list-style-type: none"> • EC Role: Name + Profession
7:40	GL Introductions – moderated by GL 30 seconds each for any guesting GLs New Member + Candidate Introductions – moderated by GL 45 seconds each
7:50	Testimonials – timed and announced by GLA 45 seconds for 1 testimonial, 90 seconds for multiple testimonials people are muted automatically at the time limit
8:05	Content/Presentation <ul style="list-style-type: none"> • 8:25 – send into small group breakouts to discuss the topic • 8:40 – full group debrief
8:50	Needs/Deals/Wants
9:00	End Meeting OR Send People Into Insta-Troikas

Source: Richard Wang - GL for Mountain View 1

