Weekly meeting Agenda

Attendees

All staff associated with sales and customers plus management

The agenda items should include:

The reports:

- Detailed debtor's ledger
- Notes/diary of all phone conversations, correspondence, complaints and meeting decisions on each customer.
- Payment agreement tracking documentation.
- List of new customers – their terms and credit limits

Targets

- Progress reports
  - A report could include a spreadsheet showing the totals outstanding from each period i.e.: Total, current, 30 days, 60 days, 60 + days. Another report showing percentages.
  - Training
  - Number of complaints and resolutions
- Complaints
  - Number of complaints per month
  - Number outstanding
  - Time taken to resolve
  - Categorise complaints to highlight business weaknesses which need improvement.
- Ongoing issues to action
  - Customers consistently overdue
  - Overdue actions implemented
- Business improvement
  - New procedures
  - Staff training

New Business

Actions

Add and subtract to this list of agenda items to whatever suits your business