5 meeting agenda templates to customize

1. Staff meeting agenda template

Meeting type, date, and time

- List of attendees

- Welcome and agenda overview
  Include meeting goals, e.g., discuss client performance and decide whether to move them up a tier.

- Presentation (if needed)

- Agenda items
  Update, discussion, decision.

- Update: Review client performance since last action

- Discussion: Does their performance warrant a tier change? And is it worth the extra costs? Brainstorm.

- Decision: Should you move them up a tier?

- Topic 2, 3, 4+ (if needed)
  Update, discussion, decision.

- Action items for next meeting

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2. Internal team meeting agenda

Meeting type, date, and time

- List of attendees

- Welcome and agenda overview - Include meeting goals and topics to cover, for example:
- 1. Review KPIs and discuss whether individual targets are being met
- 2. Plan new client onboarding and who will take them on
- 3. Review new software—do the team want to continue using it?

- Recognition
- Presentation or company update (if needed)
- Team leader updates
  Are any processes changing? Have clients been taken on/left?
- Round table
  Each colleague: name, recent wins, currently working on, anything they need help with.
- Agenda topic 1 discussion
- Agenda topic 2 discussion
- Agenda topic 3 discussion
- Problem-solving session
- Anything the team wants to add. Q&A session. Brainstorming time.
- Action items for next meeting

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3. Business meeting agenda

Meeting type, date, and time

- List of attendees
- Welcome and agenda overview
  Include meeting goals, e.g., discuss business performance during the last quarter
- Presentation (if needed)
- Action item review
  Review action items from the last meeting, and discuss whether they've been met.
  Item
  Responsible
  Due date
- Business overview
  Review key metrics, KPIs, main objectives
- Progress report
  Include the status update of all initiatives and review the budget

- Agenda topic 2, 3, 4+ (if needed)

- Update, discussion, decision-making.

- Key points
  Decisions to be made overall. Review options and make key decisions and new objectives.

- Action items for next meeting

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4. Formal meeting agenda

Company department/name
meeting agenda

- Meeting facilitator: [Name]

- Invitees: List of attendees

- Call to order
  Meeting type, date, and time. Include information such as chairperson's name and secretary's name.

- Roll call
  Voting members
  Guests
  Members not in attendance

- Approval of minutes from last meeting
  E.g., a motion to approve minutes from the last meeting date was made by [name] and seconded by [name].

- Officer's reports

- Open issues
  Description of issues
  Description of issues
  Description of issues

- New business
  Description of new business

Description of new business
Description of new business

- Motions
  E.g., [motion name] by [name] seconded by [name]. The motion was [carried or rejected] with [#] in favor and [#] against.

- Key announcements

- Adjournment

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5. Board meeting agenda template

Company department/name
meeting agenda

- Meeting facilitator: [Name]

- Welcome and meeting overview
  Includes key points to be discussed in the meeting.

- Call to order
  Meeting type, date, and time.

- Roll call
  Voting members
  Guests
  Members not in attendance

- Approval of minutes from last meeting
  E.g., a motion to approve minutes from the last meeting date was made by [name] and seconded by [name].

- Committee reports
  Executive director
  Finance director
  Nominating committee
  Governance committee
  Public relations committee

- Financial reports

- New business
  Description of new business

Description of new business
Description of new business

- Old business
  Description of old business
  Description of old business
  Description of old business

- Department updates
  Item 1
  Item 2
  Item 3

- Key announcements

- Adjournment

RingCentral is a suite of all-in-one communications tools designed to help you have more productive meetings—from anywhere in the world. With messaging, video conferencing, and a phone service all in one handy app, it gives you and your team the power to stay in touch with clients, prospects, and teammates in one streamlined tool.

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