

Issues List Example

- > The Populate quarterly MI spreadsheet with past data
- > Arrange for Melissa to populate MI spreadsheet quarterly with new data
- > Investigate What's My App to see if we can design an App
- > Speak with Simon regarding his tardy fact finding
- > Create a first meeting storyboard for use by all advisers at first meetings with new clients
- > Look at the long tail of clients and see who can be sacked, who can be on light touch and who can step up to C class minimum
- > Get quote for new carpet in office
- > Investigate why we ran out of milk last week
- > Review stationary ordering process - costs seem out of control
- > Investment process needs a look at
- > Get short list of HR suppliers (2-3) - ask other firms who they use, ask Brett Davidson
- > Does Gary need a PA? Would his productivity increase if he didn't have to answer emails?
- > Website
- > Marketing and social media - how do we do it?
- > Should we change compliance firms? Current firm doesn't seem to get what we do
- > Why is Theo always late to work? Have a chat
- > Investigate new back office technology. What is the right system and when is the best time to consider a change?
- > Get branded and named personal coffee cups for whole team
- > Arrange Christmas function - where will we go and what will we do? Delegate to someone
- > Create a Scorecard for our weekly Level 10 meetings
- > Build a business plan
- > Hold team meeting to communicate our company values - tell stories to illustrate