LoftyBiz Meeting Agenda Template

A five-part weekly sync that ends in decisions, a monthly peer-teaching session, and an offsite with owners and follow-up.

From LoftyBiz 133 — Team Meetings Worth Having: Weekly Sync, Peer Teaching and Offsites. Systex is our own product; you can find Systex at loftybiz.net, or click the link in the description.

This week's task

Rewrite your current team meeting into five parts: wins, leading numbers, priorities, biggest obstacle, and a score. Pick three numbers to show every week. Ask one team member to teach a fifteen-minute lesson next month. Put a date in the diary for a half-day offsite. Put that agenda and the lesson queue into Systex, so the routine is waiting for the team.

Weekly sync — five parts (45 minutes)

Amber rows are examples from the video, not promises. Replace them with your own.

Part	Time (example)	What we cover	Decision / owner
1. Wins	5 minutes	One good thing from last week: a happy customer, or a job done right first time	
2. Leading numbers		The few figures that show what is coming, on one page, the same every week	
3. Top priorities		Each person names the one or two things that matter most this week	
4. Biggest obstacle		The single problem most in the way. End with a decision and a name next to it	
5. Score the meeting		A number from 1 to 10, and one thing that would make next week better	

In Cornelius's example, a plumbing and heating company in Lewiston with nine people replaced a one-hour status meeting with a 45-minute weekly sync in these five parts. At first the scores were around five; within a couple of months they sat around eight. These are examples, not promises.

Three leading numbers (same page every week)

Leading number (yours)	What it tells you	This week	Notes
Example only: jobs booked for next week	Work already coming in		
Example only: quotes sent	Work that may close soon		
Example only: callbacks needed	Jobs that may need a return visit		
1.			
2.			
3.			

Meeting score tracker

Date	Score (1–10)	One thing to make next week better	Started on time?
Example only: early weeks around	5	Ran long; numbers were hard to read	No

Monthly peer-teaching queue

Anyone can teach, not just the owner. Each lesson is fifteen minutes, starts with a short win, and is recorded for new hires.

Topic	Who teaches	Date	Recorded

Example only: how to find hidden leaks quickly	A senior technician		
Example only: how to read a job sheet so invoices go out the same day	The office manager		

Offsite planner

Send the agenda and three goals two weeks ahead. Leave with no more than five priorities, each with an owner and a first step with a date. Carry them into the weekly sync.

Three goals for the day	Your notes
1. Agree on where the company is going this year	
2. Build trust (the leader goes first)	
3. Leave with no more than five priorities, each with an owner	

Priority	Owner	First step and date	In the weekly syn
1.			
2.			
3.			
4.			
5.			

In Ximena's example, a commercial cleaning and facilities company in Casper with about twenty staff, including three team leaders, left an offsite with five priorities. Four of the five were done within six months. The first draft of the agenda was too full, so she cut two sessions. These are examples, not promises.

Example figures. General education, not financial, legal, HR or tax advice. Results vary. These are examples, not promises.

Keep the agenda, decisions and recorded lessons in Systex (our own product): loftybiz.net