

## *Issues List Example*

- 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

*Advise Better*  
*Live Better*