

## Marketing Meeting – *an example*

### Situation

Our small organization is working hard and proud of our work. We are a bit tight on finances but hopeful for the future. It's time for the monthly staff meeting. Some are in our small main office and some work remotely from their homes. There are a few big things happening including a marketing effort to get our brand of services out. The marketing team has received three possible designs for a new e-postcard. We also want to keep a better pulse on our clients / customers' satisfaction so we're going to systematize the use of an online survey. Hopefully, even better customer service will help us serve more people. Meanwhile, we're finalizing next year's budget to present to the board and had to trim in some tough places. The board also wants a realistic projection on grants we may be rewarded in the next year.

### People

Full team of 12 participates in these monthly meetings. Four staff are virtual, so we all use Adobe Connect for the meetings. Typically, teams schedule conference calls immediately following the full meeting. The Marketing Firm is asked to have a representative join the meeting at 1:35pm to present the two marketing designs and answer questions.

### Location

Meeting room in Main Office and Adobe Connect platform with shared screen option, with video, call-in through phone for those who can't be at their computer.

### Time

90-minutes: 1-2:30pm on the first Wednesday of the month.

### Agenda

### Achievements

*By the end of this meeting, we will have:*

Postcards

**Named** what we like in two possible postcard designs.

Budget cuts

**Identified** major concerns with the draft 2021 budget.

Grants

**Examined** grant opportunities and **recommended** which one to pursue now.

Customer Feedback

**Revised** online survey to solicit feedback from customers.

### Meeting Process

PowerPoint presentation was created.