



PLAYBOOK

Daily Check-In Calls

Best practices and processes



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Daily Check-in Call

8:30 a.m. CT

MONDAY

Client Callouts
Presentation

Callie

Blockers/
Concerns or
Successes

Team

TUESDAY

Something
you're proud of/
excited about

Any
concerns/red
flags

Any blockers
to your day

Team

WEDNESDAY

Chaplain Program
Jayme

Agency
Updates
Callie

Blockers/
Concerns or
Successes

Team

THURSDAY

Something
you're proud of/
excited about

Any
concerns/red
flags

Any blockers
to your day

Team

FRIDAY

Client/Role
Insights Rotation

Varies

Blockers/
Concerns or
Successes

Team

The screenshot shows a meeting invite for 'Jairus Daily Check-in' on Monday, August 11, from 8:30 to 9:00am. The invite is weekly on weekdays. It includes a 'Join with Google Meet' button with the link meet.google.com/xaf-pmpp-dqc, a 'Join by phone' option with the number (US) +1 401-903-3767 PIN: 421 818 880#, and a 'Take meeting notes' option. The invite lists 31 guests, with 29 yes (7 virtually) and 2 awaiting. The agenda is as follows:

- MONDAY:** Client Callouts Presentations w/Callie
- TUESDAY & THURSDAY:** Full team reviews:
 - 1.) Something you're excited about or proud of
 - 2.) Any concerns/red flags
 - 3.) Any blockers to your to-do list today
- WEDNESDAYS:** Chaplain Program
- FRIDAYS:** Client Collabs or Role Insights (rotates)

A yellow circle highlights the 'COO: Callie' entry, which is the first item in the rotation order for the Friday slot.

ACCOUNT DIRECTORS:

- Ara
- Carmella
- Diana
- Haya
- Jan

ACCOUNT MANAGERS:

- Ashley
- Aurora
- Chloe

How do I know what order to go in during the Daily Check-in updates on Tuesdays and Thursdays?

On Tuesdays and Thursdays, we rotate through the entire team, with each person sharing something they're proud of/excited about, any concerns and any blockers to their to-do list for the day. You can find the rotation order in the meeting invite on your Google Calendar.