

How to Make Finance Meetings Not Suck — A 20-Minute Monthly Routine

Finance meetings often feel tedious, overly detailed, or disconnected from the work teams actually do. SMBs don't need long discussions — they need short, clear check-ins that keep everyone aligned.

Start the meeting with a quick review of actual spending versus expectations. This sets the stage without overwhelming anyone with detail. Surprises should be acknowledged but not debated yet.

Next, identify what changed during the month. New vendors, canceled tools, price increases, overtime, and unexpected purchases reveal the real story behind the numbers. These changes offer insight into team habits, operational bottlenecks, and emerging risks.

The most valuable part of the meeting is the action plan. This should include a few practical steps such as canceling unused subscriptions, renegotiating a vendor, tightening ad spend, or adjusting staffing. Limiting actions keeps the meeting focused and increases follow-through.

Close by setting expectations for the next month. Confirm department ranges, plan for any large purchases, and adjust for seasonality or strategic initiatives. This keeps the organization proactive rather than reactive.

A good finance meeting is short, predictable, and clarifying. With a simple routine, teams stay aligned and financially disciplined without wasting time.