

Sample Inaugural Advisory Council Meeting Agenda

11:30 **Lunch & Communication Starter**

12:00 **Brief introduction of council members**

Discuss ground rules and terms for Advisory Council

12:30 **Vision**

- Firm Vision
- Firm Mission
- Firm Value Proposition
 - What are the unique characteristics of our firm that help us meet your needs?
 - How could we better articulate what we do for our clients?

1:45 **Break**

2:00 **SWOT Analysis**

- What are our firm's greatest strengths?
- What are our firm's biggest weaknesses?
- What opportunities should our firm be taking advantage of?
- What are potential threats to the growth and success of our firm?
- How would we need to change our firm so that you would feel enthusiastic about introducing us to your friends, colleagues, and family members?

3:00 **Initiative Creation**

- What top 4-6 ideas or priorities should we implement coming out of today's meeting?

3:45 **Break**

4:00 **Time-Sensitive Feedback**

- (Input any items that you need immediate feedback on: office moves, event calendars, etc.)

4:30 **Wine & Cheese Social with Office Team**