**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**