

Agenda

Smithtown, VA HQ On-Site 10/14 - 10/17

CEO will speak on October 16 from 9-9:20 am

HQ Glassroom reserved for business meetings

	Day 1: Tuesday, 10/15 Smithtown HQ	Day 2: Wednesday, 10/16 Smithtown HQ	Day 3: Thursday, 10/17 Smithtown HQ
9:00-9:30	Gathering and Breakfast	CEO Visit (9:20 am end)	Gathering and Breakfast
9:30-10:00	Intro - What Onsite success looks like & Q4 Goals President 2 hours	People Planning Session Part 1 Jana 2.5 Hours	2023 Priorities Salem 1.5 hours
10:00-10:30			
10:30-11:00			
11:00-11:30			On-Site Wrap-Up President 1 hour
11:30-12:00	Transformation session Adam 30 mins		
12:00-12:30	Lunch (Catered)	Lunch (Catered)	Lunch (Catered)
12:30-1:00			
1:00-1:30	Buffer	Buffer	See you next year!
1:30-2:00	2023 KPI Alignment President 2 hours	People & Succession Planning Part 2 (2023 Review) Jana 1.5 hours	
2:00-2:30			
2:30-3:00			
3:00-3:30		Buffer	
3:30-4:00	Buffer	EOD Wrap-Up President 1 hour	
4:00-4:30	Recognition and EOD Wrap-Up President 1 hour		
4:30-5:00		Buffer	
5:00-8:00	All Should Come! Happy Hour - 5pm Hors D'oeuvres - 6pm (HQ Patio)	Executive Team Only Cocktails 5pm Dinner 6pm (Barrell House)	



Agenda Key Session Goals & Focus Areas

Agenda Item	Details
President's Introduction	Led by President – Overview of Q4 goals, expected outcomes for the onsite meeting.
Transformation Session	Led by Adam – Discussing organizational transformation strategies.
2023 KPI Alignment	Led by President – Aligning KPIs and metrics for 2023.
Recognition and EOD Wrap-Up	Review of the day's sessions (President's intro, Transformation, KPI Alignment). Ensure clarity on Q4 goals, transformation direction, and 2023 KPIs. Recognition for team members before closing.
Happy Hour at HQ (All Employees)	President to give a brief motivational speech, slides to highlight Q3 sales & Q4 goals. Light apps during Happy Hour; event led by Musa.
CEO Visit	CEO to speak for 20 minutes. Needs direction on key talking points.
People Planning Session (2 Parts)	Led by Jana (WebEx) – Focus on people strategy for 2023.
EOD Wrap-Up	Summary of the CEO's visit, feedback from the People Planning session, and key insights from the recognition dinner. Clear understanding of 2023 workforce plans and next steps for talent development.
Executive Team Dinner	Dinner at Barrell House at 7:00 PM. Led by Danny – confirmation required for all logistics.
2023 Priorities Session	Discussing key priorities for the upcoming year.
On-Site Wrap-Up	Final review of 2023 priorities, closing remarks from the President. The executive team leaves aligned on the company's strategy and priorities for the upcoming year. Action plans for Q4 and 2023 are clear.



Session Goals and Success Metrics

Session	Key Talking Points	Success Looks Like
President’s Introduction	Outline Q4 goals, define success metrics for the onsite.	Clear alignment on Q4 goals, full understanding of what success looks like for the onsite.
Transformation Session	Focus on transformation initiatives for 2024 and beyond.	Executive team is aligned on the direction for transformation and committed to next steps.
2023 KPI Alignment	Set the KPIs for 2023 across all departments.	All departments leave with clear KPI goals for 2023, with metrics to track throughout the year.
People Planning Session	Review 2022 people investment, discuss workforce growth strategies for 2023.	Agreement on the people investment plan for 2023, with clear targets for hiring and team expansion.
2023 Priorities Session	Define key business priorities for 2023, aligning with company’s overall strategy.	Clear understanding of the top priorities for 2023, with accountability for each department’s role.



Follow-Up Questions for the President

- CEO Speech: What key points would you like the CEO to focus on during his 20-minute session?
- Sarita's Recognition: Should we confirm Sarita's recognition during the executive dinner on the 16th, or do you prefer a different time?
- Additional Updates: Is there anything else you feel we're missing in the agenda or event planning for the onsite?



Event Planning and Tracking

Event	Details	Next Steps	Owner	Missing Information	CoS Follow-Up
All Employee Happy Hour	Oct 15, 4:00-5:00 PM; President speech with slides.	Confirm slides from Ama by 9/20. Confirm light apps with Danny.	Ama (slides), Danny (food)	Confirmation of apps delivery time.	Confirm apps delivery date.
Executive Team Dinner	Oct 16, 7:00 PM, Barrell House.	Confirm all logistics and reservations with Danny.	Danny	Confirmation on final headcount for dinner.	Confirm with Danny by 9/22.
CEO Visit	Oct 16, 9:00-9:20 AM; CEO to address team.	Confirm CEO's talking points by 9/22.	CoS	President's direction on CEO speech focus.	Draft talking points for CEO by 9/22.
Webex Setup for Jana	Webex needed for Jana's remote participation.	Confirm Webex setup with Musa.	Musa	Confirmation that Webex is ready for Jana.	Check on progress with Musa.
Catering for Lunches	Lunch at 12 PM on all 3 days.	Confirm catering orders, delivery schedule.	Danny	Confirmation of delivery time for each day.	Confirm all catering logistics.

