Team Meeting

10 OCTOBER 2022 / 11:00 AM / CONFERENCE ROOM

# Attendees

James (CEO)

Olivia (CFO)

Daniel (CTO)

John (Strategy Director)

Alex (Marketing Director)

# Agenda

1. Financial Performance Review for Last Quarter
2. Customer Feedback Implementation
3. Marketing Strategy Refinement
4. Exploration of Collaborations

# Summary

The board acknowledged the impressive financial performance, attributing growth to the company's innovative approach and user-centric platform. The emphasis on incorporating direct customer feedback showcases FinNest's commitment to addressing users' evolving needs. The exploration of collaborations, especially in emerging areas like robo-advisory and blockchain, demonstrates FinNest's forward-looking approach, although careful consideration will be needed to ensure alignment with the company's core values and objectives.

# Notes

## Financial Performance Review for Last Quarter

Acknowledged the significant growth in user acquisition and revenue.

Decision: Allocate more resources to enhance platform scalability and security.

## Customer Feedback Implementation

Noted high demand for advanced budgeting tools and customizable spending categories.

Decision: Implement the requested features to improve user experience and satisfaction.

## Marketing Strategy Refinement

Reviewed market trends and competitor actions.

Decision: Adjust our strategy to target specific niches, ensuring alignment with our mission to provide tailored solutions.

## Exploration of Collaborations

Discussed potential alliances with fintech companies in robo-advisory and blockchain areas.

Decision: To identify and evaluate potential partners based on technology, market fit, and alignment with our core values.

# Action Items

Tech Team (Daniel and Sarah)

1. Develop and integrate new budgeting tools and spending categories into the existing platform.

Marketing Team (Alex)

1. Redesign marketing campaigns to reflect the refined strategy, focusing on specific user segments.

Strategy Team (John)

1. Research and identify fintech partners for potential collaborations. Evaluate their offerings, market position, and synergy with FinNest.

# Next Meeting Agenda

N/A