**Annual Strategy Meeting – Clara CFO Group**

December 2, 2022

**Agenda**

9am-9:50am – Values, Purpose, Targets

* Company Values
* Core Purpose
* Niche
* 3 year target
* 5 year vivid vision
* BHAG discussion

Break

10am-10:50am – Marketing Strategy

* Our List –
  + Who are they?
  + Where are they?
  + What are they?
* Unique - What differentiates us?
* What is our Proven process?
* Guarantee – Do we want to offer one?
* Where do we want to show up in 2023?
  + Social
  + Conferences
  + Groups
  + Other?

Break

11am-12pm

* Where have we been – lookback at 2022
* Review current clients
* Annual goals for 2023
  + Clients
  + Team members
  + Software Upgrades
  + Processes
  + Travel
  + YouTube
* Q1 Rocks – Set specific rocks

Lunch – End of session