



meeting notes
July 16, 2019

our core values

- Expert Knowledge
 - Competence
 - Reliability
- Anticipating the What-Ifs
 - Proactive
- Connecting Beyond the Numbers
 - Relationships
- You First
 - Servant Leadership

strengths, weaknesses, opportunities, threats

- **Strengths**
 - longevity
 - our team
 - ambition
 - experience
 - one stop shop
 - culture
 - young leadership
- **Weaknesses**
 - challenge of merging the businesses
 - limited experience of running a business
 - lack of defined systems and processes
 - support for growing businesses
 - loss of institutional knowledge
 - pace - are we scaling too fast?
 - comfort level with new team members
 - homelessness (the move)
 - communication
- **Opportunities**
 - collaborations w/divisions
 - deeper impact
 - adding value to clients
 - community involvement
 - increased visibility at future location
 - baby boomers transition
- **Threats**
 - legislation
 - compliance
 - competition - self-service, technology, misinformation
 - perception about young leadership
 - lack of confidence

team homework assignment

Select two values and create a statement that describes the meaning and purpose of the value.