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*Small Business Optimization  
for  
Improved Profit in the First Year  
and  
Beyond*

# Cross Functional Team Meeting

Date

# Agenda – Day 1 (Morning)

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- Introductions 08:00 – 08:45
- Overview 08:45 – 09:50
  - Why Are We Here?
  - The Agenda Ahead
  - How We Arrived Here
  - What I hope We Accomplish
  - The Vision
- Break 09:50 – 10:00
- Team Building 10:00 – 12:00
  - Review of the day
  - Warm-ups
  - Connecting & Appreciating Differences
  - Insights—Who are we anyway?
  - Sharing & takeaways—Why get to know each other?
- Lunch 12:00 – 13:00

- Team Understanding 13:00 – 14:00
  - Role of History
  - Creating New History
- Change Models 14:00 – 14:50
- Break 14:50 – 15:00
- Team Mission Discussion 15:00 – 16:00
  - Goals
  - Keys to success
  - Recipe for disaster
- Tribal Leadership 16:00 – 17:00
  - One team
  - Our ground rules
- Dinner (Treaty Consulting Hosted) 18:30 – 21:00

# Agenda – Day 2

- Day 1 Review/Day 2 Overview 08:00 – 08:30
- Guiding Principle Development 08:30 – 09:50
- Break 09:50 – 10:00
- How to Manage Ourselves - Blind Spots & Bias 10:00 – 11:00
- Systems Thinking and Change Management 11:00 – 12:00
- Lunch 12:00 – 13:00
- Process Identification & Discussion 13:00 – 14:50
- Break 14:50 – 15:00
- Process Discussion & Mapping 15:00 – 17:00
- Evening free

# Agenda – Day 3

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- Day 2 Review/Day 3 Overview 08:00 – 08:30
- Core Task Development (What we need to do) 08:30 - 09:50
- Break 09:50 – 10:00
- Core Task Development Discussion (Quarter Jars) 10:00 – 12:00
- Lunch 12:00 – 13:00
- Task Prioritizing 13:00 – 14:50
- Break 14:50 – 15:00
- Recap and Next Step Discussion 15:00 – 16:00
- Conclude 16:00