



COMPASS EXECUTIVE FORUMS

CFO & Enterprise Finance Forum

For chief financial officers and senior finance executives accountable for enterprise economics.

A confidential room for the executives who hold the economic truth of the business. Members work capital, margin, and the difficult conversations finance is expected to lead.

What comes into the room

- Margin structure and where profit actually comes from
- Capital allocation and investment discipline
- Forecasting credibility with the board and the bank
- Finance as a partner rather than a scorekeeper
- Transaction, transition, and readiness events

What members leave with

- A sharper economic read on the operating decision
- Perspective from finance leaders in comparable seats
- Assumptions in the model challenged before the board does
- Committed actions on the few things that move margin
- Peers who understand the position without translation

ROOM

Eight-member target

STATUS

Founding members being selected — First cohort forming

HOW THE ROOM WORKS

Rhythm, method, and membership.

Session rhythm

- Monthly two-hour facilitated working session
- Quarterly extended session on a single enterprise economic theme
- Accountability check on prior commitments to open every session

How every issue is processed

- 01 Analyze** Clarify the issue, the consequence, the assumptions, and the decision it requires.
- 02 Refine** Use peer questions and relevant experience to reframe the issue and test available paths.
- 03 Commit** Define the action, the owner, the timing, and the evidence of progress.
- 04 Return accountable** Report what happened, what was learned, and what happens next.

Who belongs in this room

- Enterprise finance accountability
- Noncompeting with every other member of the room
- Prepared to bring live economic decisions
- Committed to attendance and confidentiality

Membership standards

- Bring the real issue
- Attend prepared and on time
- Remain fully present
- Protect confidentiality
- Challenge with respect
- Contribute experience without prescribing
- Make clear commitments
- Return accountable

INVESTMENT

\$400 - \$700 per month, by room and cadence

THE NEXT STEP

Request a confidential fit conversation.

Schedule directly: meetings.hubspot.com/steve-kopecky

Steve Kopecky · 224.307.0912 · skopecky@focalpointcoaching.com

500 West Silver Spring Drive, Suite K-200, Glendale, Wisconsin 53217