CONFIDENTIAL

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COMPASS PERFORMANCE INC

CFO & Enterprise Finance Forum

A confidential room of noncompeting peers.

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

IN THIS BRIEF

Architecture determines performance.

COMPASS PERFORMANCE INC

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CFO & ENTERPRISE FINANCE

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.

EXHIBIT 1

The issues members actually put on the table.

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

EXHIBIT 2

Every session ends in commitments, not conversation.

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	CADENCE	STATUS
Eight-member target	Monthly working session	Founding members being selected — First cohort forming

HOW THE ROOM WORKS

Rhythm, method, and the standard of participation.

Nothing enters the room to be discussed. Every issue is processed — examined, reframed, committed to, and returned against.

EXHIBIT 1

The standing calendar of the room.

Session rhythm

- Monthly virtual working session — up to three hours, facilitated
- Quarterly extended session on a single enterprise economic theme
- Accountability check on prior commitments to open every session

EXHIBIT 2

The same four movements, 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.

MEMBERSHIP

Who belongs, and what every member commits to.

The standards are the room. They are stated before an invitation is offered and held for as long as a member sits at the table.

A

Who belongs in this room

Fit is confirmed in both directions before an invitation.

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

B

What every member commits to

Held for as long as a member sits at the table.

- 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

THE NEXT STEP

Request a confidential fit conversation.

Investment · $400 - $700 per month, by room and cadence
Selection · By invitation following a confidential fit conversation
Schedule directly · meetings.hubspot.com/steve-kopecky
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