

# Annual Strategy Meeting

This guide highlights the most important items to include in your organization's annual planning.

## SET THE STAGE

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### Purpose

Revisit the long term plan and answer the question, "does this still apply?"

### Audience

C-Suite / Decision-makers

### Duration

4 Hours, including breaks between sessions

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## PROPOSED AGENDA

15 min

### MISSION & VISION

- State the current Mission & Vision.
  - Do they still apply? Require edits?
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30 min

### SWOT ANALYSIS

- List all Strengths & Weaknesses (internal).
  - List all Opportunities & Threats (external).
- 

30 min

### LONG TERM TARGETS

(3 - 5 years)

- What does success look like in a few years?
  - How does each team contribute?
  - What are the major barriers to success?
- 

1 hour

### SHORT TERM TARGETS

(1 year)

- What does success look like in 365 days?
  - What are the major inter-team dependencies?
  - Which items in the SWOT Analysis are most connected to success?
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1 hour

### DEPARTMENT OR TEAM METRICS

(3 - 5 maximum)

- Did we measure the right things?
- Are we using industry standard metrics?
- Are the metrics actionable?
- Do the different department / team metrics align?

## ADDITIONAL RESOURCES

- ▶ View our full training course "[Start a Strategic Cadence](#)".
- ▶ Contact us at [Service@Strategypoint.co](mailto:Service@Strategypoint.co) to connect with an expert.