

Quarterly Strategy Meeting

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

SET THE STAGE

Purpose	Audience	Duration
Reflect on progress achieved.	Leadership & Team Leads	2 Hours
Set measurable goals for the next 90 days.		including breaks

PROPOSED AGENDA

5 min	GET IN THE GROOVE	<ul style="list-style-type: none"> C-Suite share biggest WINS from last quarter. . Each person shares most significant lessons learned.
5 min	REVIEW OF PREVIOUS QUARTER INITIATIVES	<ul style="list-style-type: none"> Were the initiatives realistic & the right focus? Did our team metrics end up contributing to these major initiatives?
10 min	REVIEW OF FUTURE VISION	<ul style="list-style-type: none"> What can we do this quarter to get closer to the end goal? Has anything major changed that would update this future vision? Has the SWOT changed since last quarter, and would any of those factors change our future vision?
60 min	DEFINE COMPANY GOALS	<ul style="list-style-type: none"> Define the 2-3 most IMPACTFUL goals per team or department. Which goals are evergreen (recurring) and which are quarter-specific? Are goals industry best practices or unique?
30 min	TACKLE KEY ISSUES	<ul style="list-style-type: none"> How will each team measure these goals? Is it possible? What are the barriers to success?
10 min	NEXT STEPS	<ul style="list-style-type: none"> Identify new routines & special projects required. Plan any inter-departmental meetings & brainstorm.

ADDITIONAL RESOURCES

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