

Monthly Strategic Meeting

Set time each month, TBD

Purpose: Report out on progress against plan, make changes to the plan, and determine the strategic focus for the next 30 days.

Prep: The status of all goals and initiatives has been updated for the entire team.

Attendees: TBD

I. WELCOME & INTRODUCTIONS

- Purpose of the meeting.
- CEO introduction/ kick-off.

II. FINANCIAL PERSPECTIVE

- For each corporate goal, report out:
 - Comment on the performance of the key metric– movement from last month.
 - Going well – what movement results are we seeing? And why?
 - Not going well – what are we concerned about? What are we doing about it?
 - Note learnings – what did we learn last month?

III. CUSTOMER PERSPECTIVE

- For each corporate goal, report out:
 - Comment on the performance of the key metric– movement from last month.
 - Going well – what movement results are we seeing? And why?
 - Not going well – what are we concerned about? What are we doing about it?
 - Note learnings – what did we learn last month?

IV. OPERATIONAL PERSPECTIVE

- For each corporate goal, report out:
 - Comment on the performance of the key metric– movement from last month.
 - Going well – what movement results are we seeing? And why?
 - Not going well – what are we concerned about? What are we doing about it?
 - Note learnings – what did we learn last month?

V. PEOPLE PERSPECTIVE

- For each corporate goal, report out:
 - Comment on the performance of the key metric – movement from last month.
 - Going well – what movement results are we seeing? And why?
 - Not going well – what are we concerned about? What are we doing about it?
 - Note learnings – what did we learn last month?

VI. SPECIAL TOPICS

- For each special topic, report out:
 - Are we on or off target?
 - Focus for the last 30.
 - Focus for the next 30.
 - Asks of the group.

VII. WRAP UP & FOCUS FOR THE NEXT MONTH