

Monthly Strategy Review Meeting

Set time each month, TBD by client

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: Leadership Team

**Rearrange/customize agenda perspectives based on your plan. Reorder or eliminate perspectives if appropriate.*

Prior to Each Meeting:

- Comb through the plan to note:
 - Goal status' – know what is on and off target.
 - Goal updates – know what has or hasn't been updated.
 - Internal dynamics – note common themes and/or other things of note.

I. WELCOME & INTRODUCTIONS

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

II. FINANCIAL PERSPECTIVE

Talking Point: The goal is _____ and what we are trying to achieve is _____

- Performance Measure #1
- Performance Measure #2

- 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

Talking Point: Our initiatives to accomplish the goal are progressing as follows:

_____ are on target out of _____ total initiatives
_____ number of cross functional initiatives and _____ number of departments w/ initiatives

- 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?
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 - Note learnings – what did we learn last month?

IV. OPERATIONAL PERSPECTIVE

Talking Point: Looking at our cross-functional initiatives, here is what is going on....

- *We accomplished the following initiatives last month – kudos to...*
- *We are focused on this coming month and need your help as follows...*
- *Help or anything new that you see happening org-wide that we should think about in the context of achieving this goal? (open it up to discussion here)*

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- For each corporate goal, report out:
 - Comment on the performance of the key metric– movement from last month.
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 - 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

Talking Point: Our initiatives to accomplish the goal are progressing as follows:

_____ are on target out of _____ total initiatives
_____ number of cross functional initiatives and _____ number of departments w/ initiatives

- 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?
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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

- Reaffirm the next meeting date
- Outline any changes to the plan that will be made as a result of the meeting.
- Outline next steps based on any “offline” items that need to be taken up by the team.