

Strategic Planning

Strategy Review Sample Agenda

Welcome Strategy Leader!

To help you run an effective strategy review, we've provided a sample agenda template for you to leverage at your next strategy review.

This download includes:

Sample Strategy Review Agenda Sample Leaders Strategy Review Agenda



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

WELCOME & INTRODUCTIONS I.

- 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?

OPERATIONAL PERSPECTIVE IV.

- 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?

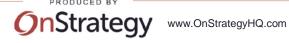




SPECIAL TOPICS VI.

- 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





Monthly Strategy Review Meeting - LEADERS AGENDA

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:
 - o Goal status' know what is on and off target.
 - o Goal updates know what has or hasn't been updated.
 - o 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 tryin	g 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**

<u>Talking Point:</u> Our <u>initiatives</u> 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?
 - 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**





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)

Prior to Meeting:

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

<u>Talking Point</u> : Our <u>initiatives</u> 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?
 - Not going well what are we concerned about? What are we doing about it?
 - Note learnings what did we learn last month?

SPECIAL TOPICS VI.

- 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.

