AGENDA FOR REVIEWING WHOLE PLAN

***Meeting Duration & Frequency:*** 60-90 mins; monthly; dedicated meeting to this topic

***Attendees:*** All Goal Owners

***Materials Needed:*** OnStrategy Live Dashboard OR Printed Dashboard

***Goal Owners Prep:***

1. Status of all Goals, KPIs & Initiatives are up to date in OnStrategy
2. Be prepared to present the following in 2 mins or less per goal (20% look back, 80% look forward)
   * Comment on the Goal Performance – specifically the performance measure status YTD.
   * Comment on the YTD performance of the supporting key performance measures if relevant
   * For supporting initiatives, comment on the plan for “getting to green” for “reds” & “yellows”

# Overall Performance (STRATEGY LEADER & CEO) - 5 mins

* General Announcements, Message from the CEO (CEO)
* Recap purpose and flow of meeting (Strategy Leader)

# Strategic Objective/Priority #1 (GOAL OWNERS) 2 MINS X # OF GOALS

* 1. GOAL NAME HERE (OWNER)
  2. GOAL NAME HERE (OWNER)
  3. GOAL NAME HERE (OWNER)

# Strategic Objective/Priority #2 (GOAL OWNERS) 2 MINS X # OF GOALS

* 1. GOAL NAME HERE (OWNER)
  2. GOAL NAME HERE (OWNER)
  3. GOAL NAME HERE (OWNER)

~ REPEAT THE ABOVE FOR ALL STRAGEIC OBJECTIVES/PRIORITIES ~

# Wrap Up & Focus for the next Month (STRATEGY LEADER & CEO)

* Summarize updates or adaptations to the goals or initiatives based on the report out
* Summarize strategic decisions made
* Set next meeting date

AGENDA FOR REVIEWING BY THEME

***Meeting Duration & Frequency:*** 60-90 mins; monthly; dedicated meeting to this topic

***Attendees:*** All Goal Owners

***Materials Needed:*** OnStrategy Live Dashboard OR Printed Dashboard

***Goal Owners Prep:***

1. Status of all Goals, KPIs & Initiatives are up to date in OnStrategy
2. Be prepared to present the following in 2 mins or less per goal (20% look back, 80% look forward)
   1. Comment on the Goal Performance – specifically the performance measure status YTD.
   2. Comment on the YTD performance of the supporting key performance measures if relevant
   3. For supporting initiatives, comment on the plan for “getting to green” for “reds” & “yellows”

# Overall Performance (STRATEGY LEADER & CEO) - 5 mins

* General Announcements, Message from the CEO (CEO)
* Recap purpose and flow of meeting (Strategy Leader)

# REvenue Growth Theme (GOAL OWNERS) 2 MINS X # OF GOALS

***ALL GOALS HERE THAT ARE FROM THE REVENUE & CUSTOMER PERSPECTIVES***

* 1. GOAL NAME HERE (OWNER)
  2. GOAL NAME HERE (OWNER)
  3. GOAL NAME HERE (OWNER)

2.1 GOAL NAME HERE (OWNER)

2.2. GOAL NAME HERE (OWNER)

# Profitability Theme (GOAL OWNERS) 2 MINS X # OF GOALS

***ALL GOALS HERE THAT ARE FROM THE OPERATIONAL EXCELLENCE & PEOPLE***

* 1. GOAL NAME HERE (OWNER)
  2. GOAL NAME HERE (OWNER)
  3. GOAL NAME HERE (OWNER)

4.1. GOAL NAME HERE (OWNER)

4.2 GOAL NAME HERE (OWNER)

# Wrap Up & Focus for the next Month (STRATEGY LEADER & CEO)

* Summarize updates or adaptations to the goals or initiatives based on the report out
* Summarize strategic decisions made
* Set next meeting date

AGENDA FOR REVIEWING   
JUST “OFF TARGET & CRITICAL”

***Meeting Duration & Frequency:*** 30-60 mins; part of another meeting if helpful to reduce number of meetings

***Attendees:*** All Goal Owners OR just exec team

***Materials Needed:*** OnStrategy Live Dashboard OR Printed Dashboard; filtered by reds & yellows

***Goal Owners Prep:***

1. Status of all Goals, KPIs & Initiatives are up to date in OnStrategy
2. Be prepared to comment on the plan for “getting to green” for “reds” & “yellows”

# Overall Performance (STRATEGY LEADER & CEO) - 5 mins

* General Announcements, Message from the CEO (CEO)
* Recap purpose and flow of meeting (Strategy Leader)

# Strategic Objective/Priority #1 (Strategy Leader)

JUST THE GOALS HERE THAT ARE YELLOW (OFF TARGET) OR RED (CRITICAL)

# Strategic Objective/Priority #2 (Strategy leader)

JUST THE GOALS HERE THAT ARE YELLOW (OFF TARGET) OR RED (CRITICAL)

~ REPEAT THE ABOVE FOR ALL STRAGEIC OBJECTIVES/PRIORITIES ~

# Wrap Up & Focus for the next Month (STRATEGY LEADER & CEO)

* Summarize updates or adaptations to the goals or initiatives based on the report out
* Summarize strategic decisions made
* Set next meeting date