



StrategySprints™

A guide to establish a quarterly rhythm for strategy and execution.

This guide covers:

- [What are StrategySprints™](#)
- [Types of StrategySprint™ Meetings & Pro Tips](#)
- [How to Create Your StrategySprint™ Cycle](#)
- [How to Report & Plan Simultaneously](#)
- [How to Run a Great Quarterly Review](#)
- [A Canvas to Build Your Own StrategySprint™ Cycle](#)

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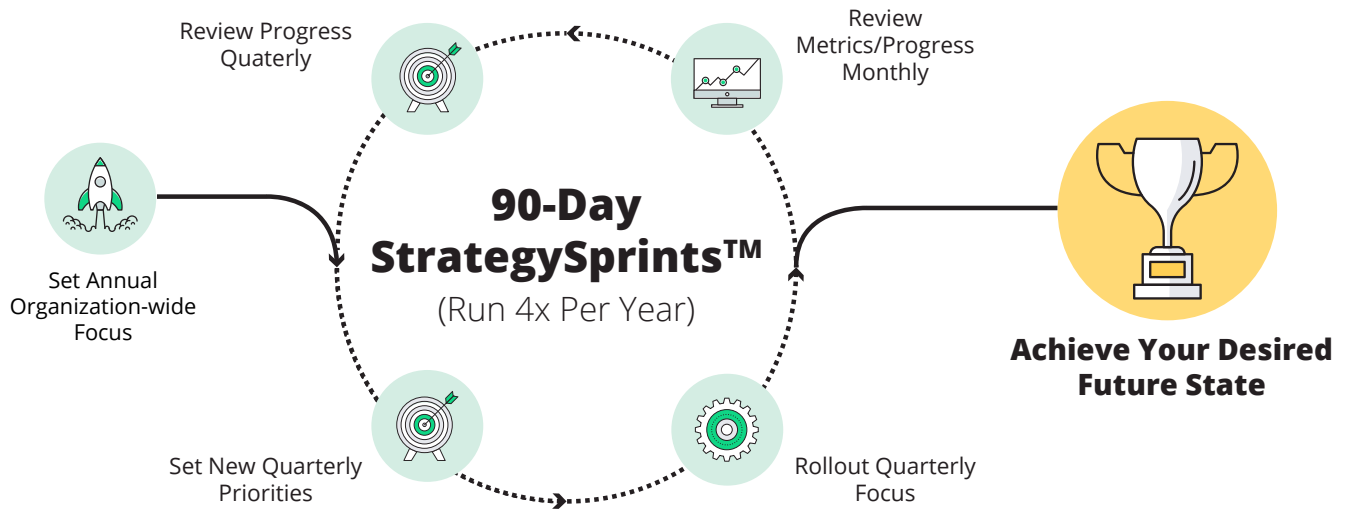


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What Are StrategySprints™?



The expectation to organizations with agility and fluidity has grown to become the norm, not the rule. But, where do you start? How do you adopt an agile planning process? Enter StrategySprints™.

A StrategySprint™ is a 90-day strategic performance cycle used to connect your long-term vision to weekly activities.

In each 90-day sequence, you set quarterly focus, review results monthly, then review and refresh your plan at the end of each cycle. Adapt and change while still staying aligned to your long-term vision.



[Watch the Video Here](#)

Types of StrategySprint™ Meetings & Pro Tips

There are three types of meetings (and one optional meeting) used in StrategySprints™, each accomplishes a specific task to keep your team focused and aligned.

01

Annual Company-wide Priority Setting

These are the traditional annual planning meeting, with a twist. You'll set company-wide annual strategic priorities or objectives for the year aligned to your 3(ish) year vision of success.

Tip

When you set your annual priorities/objectives, you should also review your previous annual performance. However, annual meetings **ARE NOT** the only time you need to be reviewing and refreshing your plan.

02

Quarterly Reviews and Refresh

Quarterly reviews are designed to review your performance and articulate focus for the next 90 days.

We consider quarterly strategy reviews “table stakes” when it comes to the agile planning process.

Tip

Not holding quarterly strategy reviews is a surefire way to lose focus on how your organization is performing against your goals, not just near-term, but long-term.”

03

Monthly Check-ins

Monthly reviews are purpose-built sessions to review the performance of your OKRs/goals and decide what critical actions you need to take in the next 30 days.

Tip

The most successful monthly check-ins review core business metrics and performance.

04

OPTIONAL Weekly KPI Reviews:

You can integrate a component of the review process into your regularly scheduled weekly operational meetings. These weekly meetings show where there is momentum and where there are drags, clarifying the priorities for your team over the next 5 to 7 days.

Tip

Don't create a new meeting if you want to review performance weekly. Integrate it into another standing weekly meeting as an agenda item.



Caution—Don't "Over-Plan"

Once you've determined your cycle to manage your OKRs/goals, work with your executive team to set annual company-wide goals/objectives. Then, work with their teams to set quarterly key results or actions.

[You can read about how to create OKRs here!](#)

The purpose behind this is to create agility and not "over-plan" work. Instead, you're planning and managing results quarterly, which helps create a more exciting and dynamic goal setting practice.



It's OK to Not Use OKRs

If you already have a planning structure and don't want to use OKRs, that's ok! Follow the principles in this guide and use any structure you'd like. Just know that you should complete the following:

- » **Create Annual Company-wide Priorities:** Set the focus for the entire organization on an annual basis.
- » **Create Annual Department Priorities:** Create shared and aligned annual department priorities that support your annual company-wide focus.
- » **Have Your Teams Refresh Goals/Actions Quarterly:** The power in agile planning is refreshing quarterly.



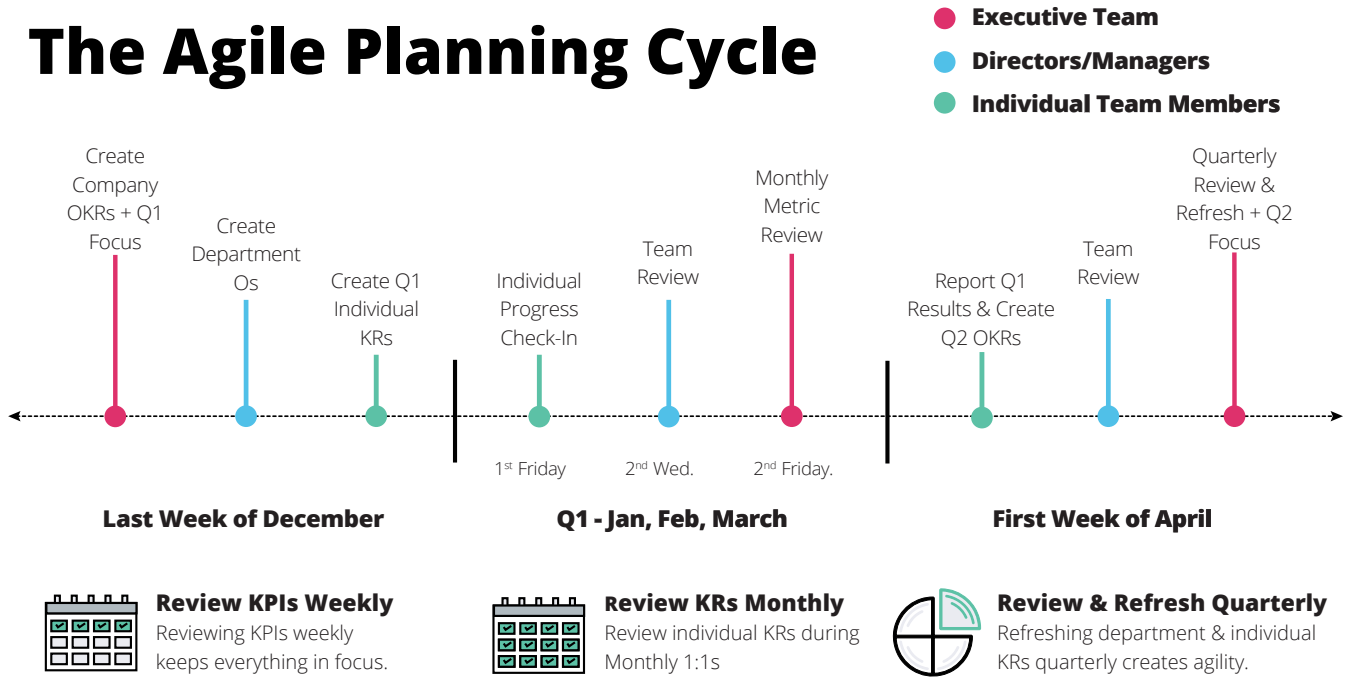
Be Consistent and Visible

We know the “pro” of this approach is building agility into your organization. The “con” is the process can buckle under its \ weight if not managed simply and seamlessly. Here are a few tips:

- » **Rigorous Consistency:** Establish the cycle and dates for the year. Publish them and commit. Do not cancel meetings.
- » **Company-wide Visibility:** Not only do you want to discuss results at a team or company-wide meeting, you also want to publish results physically via dashboards or other reporting mechanisms.
- » **“Aspirational” Commitments:** As a team, you win and lose together. The act of making quarterly commitments (via setting individual OKRs/actions) and reporting on them can feel punitive. Remember achieving around 70% of key results is the idea. In other words, some “reds” and “yellows” are OK.

Create Your StrategySprint™ Planning Cycle

The Agile Planning Cycle



Above is an illustration of a quarterly agile planning cycle. To make this work for you, here are a few questions to answer. Use your answers here and the worksheet to build a quarterly process for your team.

1. What system or tool will you use to capture and manage goals/OKRs?
2. Will monthly check-ins be conducted as part of 1:1s or included in your monthly staff meeting?
3. Do you want to include dedicated time for strategic topics at your monthly/quarterly business or will those be handled at different meetings?

A Step-by-Step Agile Planning Cycle

	Milestone	Who?	How?	When?
Kicking off the Year & Q1				
1.	Establish Company-wide Priorities & OKRs/goals for 20XX and Q1	Executive Team	Annual Leadership Offsite	1 Month Before New Planning Year
2.	Establish Annual Department Objectives/Goals and Individual KR/ Actions	All staff	Dedicated Team Planning Meetings & 1:1s	2 Weeks Before New Planning Year
3.	Roll-out Company-wide & Team Q1 OKRs/Goals	All Staff	Company-wide Meeting	1 st Week of Q1
Managing Results Months 1-3				
4.	Individual Progress Check-In	Individuals	1:1s w/Supervisor	1 st Friday of Every Month
5.	Team Progress Review	Departments/ Teams	Team Review	1 st Wednesday of Every Month
6.	Monthly Metric Review	All staff	Monthly Check-In	2 nd Friday of Every Month
Reviewing Q1 Performance & Setting Q2 Goals				
7.	Report Q1 Performance, Create Q2 KR/Actions	All staff	Individuals update the OKR/ Goal Tool & Review in Team Meeting or 1:1s	1 st Week of the New Quarter
8.	Hold Organization-wide Review, Set Q2 Focus Publish Results	All staff	Quarterly Business Review	1 st Week of the New Quarter

How to Report on Performance & Plan Simultaneously

The trickiest part of streamlining an OKR cycle is reporting on performance and establishing the next quarter's goals at the same time. Here's how to make it easier. For every key result, goal or initiative, use the three "C's:"

- 1. Close Out:** Close out the key result by reporting on the actual progress or metric achieved at the end of the third month.
- 2. Carry Forward:** Determine if this key result will continue into the next quarter. If so, extend the end date to the end of the end of the next quarter and set the desired end of quarter target.
- 3. Create New:** Determine if any new key results need to be established to achieve the objective. If so, write new key results: establish the target and set the end-date for the end of the third month.

For whatever OKR software tool you are using, you need to output the Performance Report for the previous quarter and the Action Plan for the upcoming quarter.

Tip

While you are "refreshing" your goals and objectives every quarter, most of the time you will carry forward the objective and most of the key results (specifically quantifiable outcomes). What you will "refresh" is establishing the target for the next quarter and likely new key results that are efforts or initiatives.

Running a Great Quarterly Business Review

How to Run a Quarterly Review

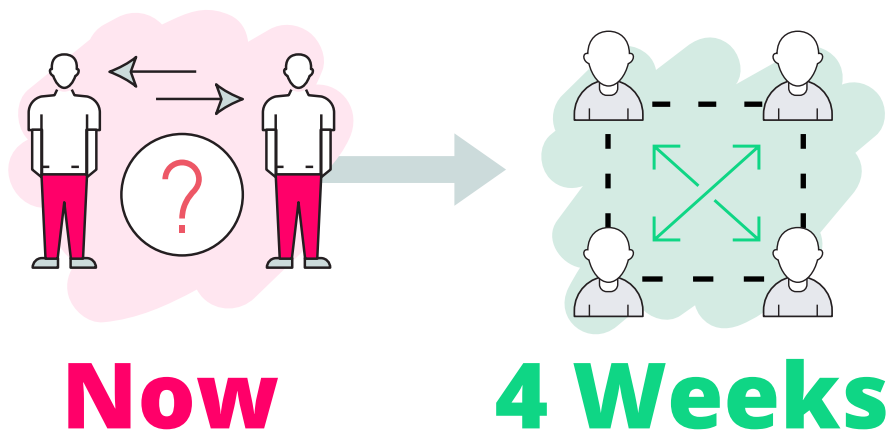
The heartbeat of a productive StrategySprint™ is a Quarterly Business or Strategy Review. There are many different ways to run this meeting, however, here is a tried and true agenda to start with and evolve to your culture.

- » **Time Allocation:** Quarterly for 2 hours.
- » **Attendees:** Executive team and direct reports if running a team review.
- » **Preparation:** All Goals/OKRs have current performance data through the end of the quarter.
- » **Purpose:** To review company-wide performance goals/OKRs driving strategic priorities and calibrate focus for upcoming quarter. (NOTE: This meeting is NOT public shaming for non-performance. That is handled in 1:1s, of course.)

Sample Review Agenda

Lead	Agenda Item	Time
CEO/Leader	CEO/Leader Setting the Stage	5 Minutes
Objective Owners	<p>Strategic Priority #1 Objective #1 (objective owner reports as follows)</p> <ul style="list-style-type: none"> » Overall progress of the objective » Progress for each key result & next quarter commitments. <ul style="list-style-type: none"> · What was achieved and why? What was not achieved and why? · What is the focus for upcoming quarter & specific targets/deliverables? <p>***Repeat for Each Objective.</p>	<p>2 Minutes Per Objective</p> <p>80% Look Forward</p> <p>20% Review Performance</p>
Objective Owners	<p>Strategic Priority #2-#X</p> <p>***Repeat for each priority as noted above</p>	<p>2 Minutes Per Objective</p> <p>80% Look Forward</p> <p>20% Review Performance</p>
Topic Owner	<p>Strategic Topic Deep Dive</p> <p>Use this time for specific topics that require you to potentially shift your strategy.</p>	30 Minutes (Time Permitting)
	<p>Evaluation</p> <ul style="list-style-type: none"> » What did we learn from our implementation last quarter? » What changes / adaptations will we make to our plan? » Recap company-wide OKRs/goals 	5 Minutes

Let an Expert Run Your StrategySprint™



We Can Get Your Team Aligned in 4 Weeks.

Led by a Senior Strategist and supported by the OnStrategy app, you will establish four 90-day strategic performance cycles to connect your long-term vision to weekly activities.

- » **First 30 Days:** Build your bold, big vision and tight quarterly targets.
- » **Next 60 Days:** Run monthly strategic performance reviews.
- » **Every 90 Days:** Run quarterly strategy refreshes, publish results & set focus for the next 90 days.

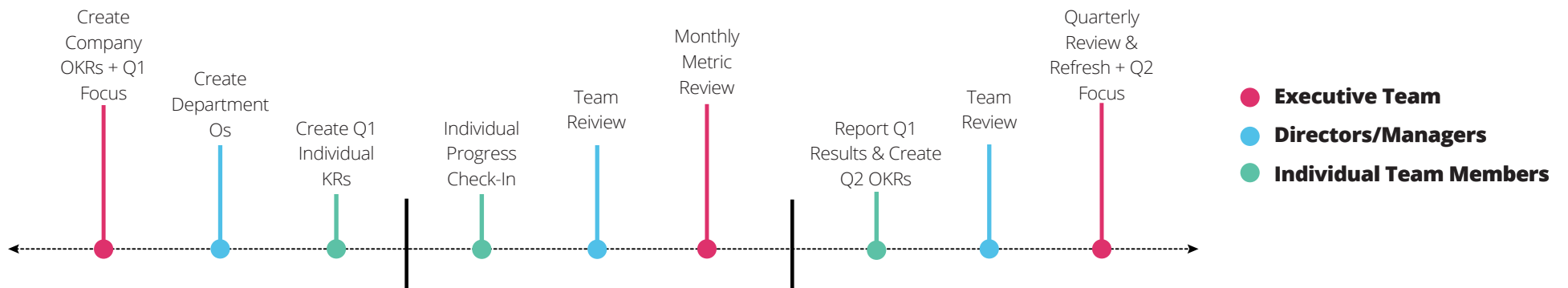
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Canvas to Build Your StrategySprint™

1 Set Your Strategic Performance Cycle: Complete the Fields to Populate the Timeline Below

	Annual Planning	Quarterly Refreshes	Monthly Reviews
Executive Team	<p>Create Annual Company-wide Goals/OKRs</p> <p>Tip—These are created first.</p> <p>Date: Leader: Attendees:</p>	<p>Quarterly Review + Refresh Focus for Next Quarter</p> <p>Tip—This is completed last after the Team & Individual Refreshes.</p> <p>Meeting Dates Q1: Q2: Q3: Q4: Attendees:</p>	<p>Company-wide Monthly Metric Review</p> <p>Tip—We recommend completing this last and on the 2nd Friday of each month.</p> <p>Meeting Date: Leader: Attendees:</p>
Directors/Managers	<p>Create Annual Department Objectives/Goals</p> <p>Tip—These are created after the company-wide objectives/goals have been set for the year.</p> <p>Date: Leader: Attendees:</p>	<p>Team Review/ Refresh Department Objectives</p> <p>Tip—This is completed second after individuals create and refresh quarterly KR's.</p> <p>Meeting Dates Q1: Q2: Q3: Q4: Departments:</p>	<p>Team Review</p> <p>Tip—We recommend completing this second and on the 2nd Wednesday of the month.</p> <p>Date: Departments:</p>
Team Members		<p>Create/Refresh Quarterly Individual Actions/KRs</p> <p>Tip—This is completed first before the Team Review and Executive Review.</p> <p>Due Dates Q1: Q2: Q3: Q4:</p>	<p>Individual Progress Check-In</p> <p>Tip—This is completed first on the 1st Friday of the month.</p> <p>Dates:</p>

2 Use Your StrategySprint™ Timeline





Need help running your StrategySprint™?

Contact us at Hello@OnStrategyHQ.com or follow **this link** to tap into our expertise.

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