



Agenda: 121 Meeting

01

- Where is your head?
- Where is your heart?
- Anything on your mind?

10 Minutes

02

- Were action items from the last meeting completed?
- Any headlines to share?

10 Minutes

03

- Progress on projects and priorities
- Review scorecard metrics
- Capacity check; have you been given tasks by other team members?
- Discuss items on issues list and set action items, move to other meetings, or resolve

35 Minutes

04

- Review new action items
- What do you grade the meeting?

5 Minutes



Agenda: The Annual Meeting Day 1

01	<ul style="list-style-type: none">• Prayer & Ice Breaker• Personal & Professional Best Last Quarter• What Is Exceptional in the Business?• What are Biggest 1-3 Pain Points?• Expectations for our Annual Session	1 Hour
02	<ul style="list-style-type: none">• Revenue, Profit, Metrics• Quarterly Projects Recap• Grade the Quarter• Share Data & Same Page	3.5 Hours
03	<ul style="list-style-type: none">• List Issues• Challenge Vision• Review Org Chart• Get 100% Aligned on New 3-Year Picture	1 Hour
04	<ul style="list-style-type: none">• Celebrate Progress• Clarify Expectations	30 Minutes



Agenda: The Annual Meeting Day 2

01	<ul style="list-style-type: none">• Highlights from Day 1	30 Minutes
02	<ul style="list-style-type: none">• Get Aligned Before Next Year Planning Focus• Portion of Future Focus<ul style="list-style-type: none">◦ Plan for Next Year◦ Plan for Q4	1 Hour
03	<ul style="list-style-type: none">• Set Quarterly Projects for Q4• Address all Issues Impeding Progress in Next 90 Days	3.5 Hours
04	<ul style="list-style-type: none">• How're You Feeling?• Were Your Expectations Met?• Did We Live in Our Values?	30 Minutes



Agenda: The Quarterly Meeting

01	<ul style="list-style-type: none">• Connection Activity &/Or Training• Prayer• Personal & Professional Best for Quarter• Expectations for Time Together	1 Hour
02	<ul style="list-style-type: none">• Review Prior Quarter Projects• Review Quarter Progress• Review Progress Against Annual Operating Plan• Grade the Quarter	1 Hour
03	<ul style="list-style-type: none">• Line Out Potential Projects• Vote and Set Top 5 Department Projects• Vote and Set Individual Projects	3.5 Hours
04	<ul style="list-style-type: none">• How're You Feeling?• Were Your Expectations Met?• Did We Live in Our Values?• What Do You Grade the Meeting?	30 Minutes