

Full Day Internal Quarterly Planning Session Agenda

_____ to serve as Facilitator for the planning session and responsible for taking notes and all follow up action needed. In preparation please have lunch pre-ordered and all materials printed and ready to go to eliminate any interruptions or roadblocks.

- 9:00-10:00** **State of the Union**
- 10:00-10:30** **Revenue & Goals: Analysis/Compare to previous quarterly on Track**
- 10:30-12:00** **Dangers & Opportunities of each area**
- i. **Marketing/Prospect**
 - ii. **New client process**
 - iii. **Client experience/Promises**
 - iv. **Team/Roles**
- 12:00-1:00** **Working Lunch (Pre-ordered and delivered at designated time)**
- Brain Dump of Possible Supporting Projects**
- 1:00-3:00** **Identify which ones will make it to the 4 Power Project and what goes to the future ideas for next retreat**

DECIDE and DECLARE

1. Use the Power Project Key Elements on each of the project as a check and balance “weeding out process” to make sure this is achievable, we are committed to investing in the additional resources if you need too, etc.
2. Team members are ACTIVE PARTICIPANTS in this---everyone needs to understand WHY the decisions are being made...new computers, IT, software, etc.

Narrow down the 4 Power Projects: Run a Power Project Key Element on each to get buy in, clarity & excitement) 15 min. per project

3:00-4:30 **Complete The 4 Power Project Tracker (20 minutes Each)**

4:30-5:00 **Debrief/Close the Day**

Each person shares what they got out of the day & The thing they are most excited about is...

NOTE: Make certain to add 15 minutes on your weekly Stakeholders agenda to check in on your 4 Power Projects and Track progression/roadblocks, etc.