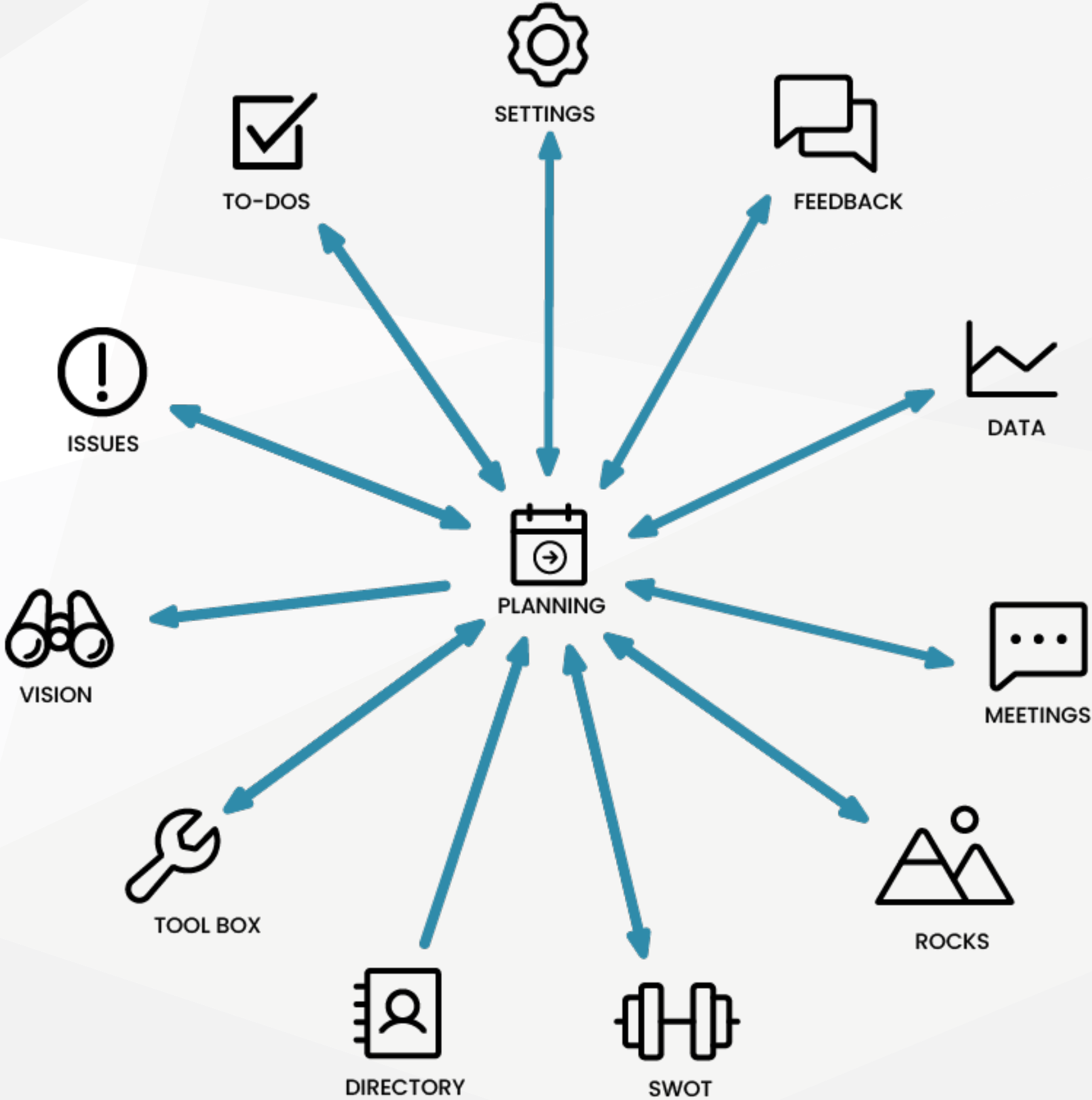# Quarterly Planning

When down in the trenches, it can be challenging to remember the bigger picture. Emails are flying, day-to-day work is consuming our attention, and we're so focused on winning each day that we lose sight of our Compelling and Audacious Goals. We get so caught up working in the business that we forget to work on the business.

Quarterly Planning Meetings (QPMs) provide a space for teams to sit back every 90 days and assess progress toward Compelling and Audacious Goals (CAGs). More importantly, teams have a chance to reflect on and celebrate our Work. Quarterlies are a time for us to let daily stressors sit in the back seat and instead focus on our Vision.

Quarterly Planning Meetings

Senior Leadership Teams prepare for the QPM by taking Ninety's Baseline Assessment that gauges a company's mastery of each of the 9 Core Competencies and its readiness to adopt a Business Operating System (BOS). Other teams can take the shorter Org Fitness Review instead. (To learn more about the assessments that help Ninety thrive, check out our Assessments Brief.)

Ninety's standard QPM agenda has **ten sections** (described below), but companies can also create their own custom meeting agendas within Ninety to fit their specific needs.

QPM AGENDA

1. **Objectives** — Begin the QPM with an introduction from the person leading the meeting. This facilitator walks the team through the agenda and sets goals for the meeting.

2. **Check-In** — Next, we have an extended version of our Weekly Meeting's check-in. Each person shares:

   - A personal and professional best from the last 90 days

   - What's working and what's not working

   - Their specific expectations for the day

   These open-ended questions often bring to light Issues we need to add to our Long-Term Issues list. They also make clear what each person needs and what a collective "win" for the day looks like.

3. **Quarter Review** — We look at key performance indicators (KPIs) in the past quarter's Scorecard, such as revenue and profit, and create Issues to discuss any off track KPIs. Then, we review last quarter's Rocks. Are they done or not done? There are a few ways to handle incomplete Rocks:

   - If it makes sense, bring it forward into the new quarter.

   - If it's close to done, make it a To-Do.

   - If it's far from complete and requires discussion, add it to the Long-Term Issues list.

   - If there's an associated Rock (e.g., phase 2), send a copy of the completed Rock to Long-Term Issues.

4. **9 Core Competencies Review** — We discuss the Baseline Assessment or Org Fitness Review results, with a special focus on the scores assigned to the 9 Core Competencies. Getting to greater than 90% strong across each core competency is essential to building a great company.

5. **Focus Filters** — We review and either reaffirm or revise our organization's Vision so everyone's on the same page about who we are, what we are, where we are going, and how we are getting there. Then, we revisit our goals because progressing toward them is one of the end-games of the Quarterly. Almost everything we talk about should keep our Compelling and Audacious, 3-Year, and 1-Year Goals in mind.

6. **Operating System Upgrades** — This section focuses on improving the company's operation through the lens of Ninety's growing collection of company-building concepts,

disciplines, and tools (CDTs). We consider whether we should cascade the use of a CDT to other teams, increase our mastery of it, or adopt a brand new one. A business coach is infinitely helpful in reviewing possible upgrades to a company's Business Operating System.

7. **90-Day Goal Setting** — Next, we establish the upcoming Quarter's 90-day Numerical Goals and Rocks. These 90-Day Goals help us ensure we're on track to achieve our 1-Year and 3-Year Goals. We likely already have Rock candidates in our Long-Term Issues list, but we may also decide to address new Issues or opportunities with a Rock. Be careful not to overdo it: The ideal number of Company Rocks (set by the Senior Leadership Team) is three to seven. These often inform departmental Rocks, which should also be no more than seven. Finally, each team member takes on individual Rocks. Try not to give anyone more than seven Rocks, all told.

8. **Long-Term Issues** — This section is the meat of the Quarterly. Through a process named Raise, Discuss, and Resolve (RDR), we look at and solve the Long-Term Issues that weren't turned into Rocks and aren't candidates for future Rocks. Most of these have been developing over the past quarter or in the previous sections of this Quarterly. The goal is to get to the heart of the Issue. We recommend ranking Issues in Ninety so everyone is on the same page regarding what needs to be resolved during this meeting. Long-Term Issues lists often have many things that can wait a quarter or two. We RDR all possible Issues and change anything that's still a priority at the end of the session into a Short-Term Issue to address in an upcoming Weekly Meeting.

9. **Next Steps** — This is a quick review of all To-Dos created to hold team members accountable for the action steps and agreements we generated during the Quarterly.

10. **Conclude** — Everyone provides feedback on the meeting. We also reflect on the expectations we set during the Check-In and decide if the session met them. To close the day, we rate the Quarterly's preparedness, productivity, and effectiveness on a scale of 1 to 10.

Context

The critical element of Quarterlies is in the name — their quarterly timing. Day-to-day work consumes our time, and after 90 days, we are likely to have put long-term goals on the back burner. Quarterlies pull those long-term goals back to the forefront of our minds. They get the team excited about the possibilities that accomplishing those Compelling and Audacious Goals will unlock.
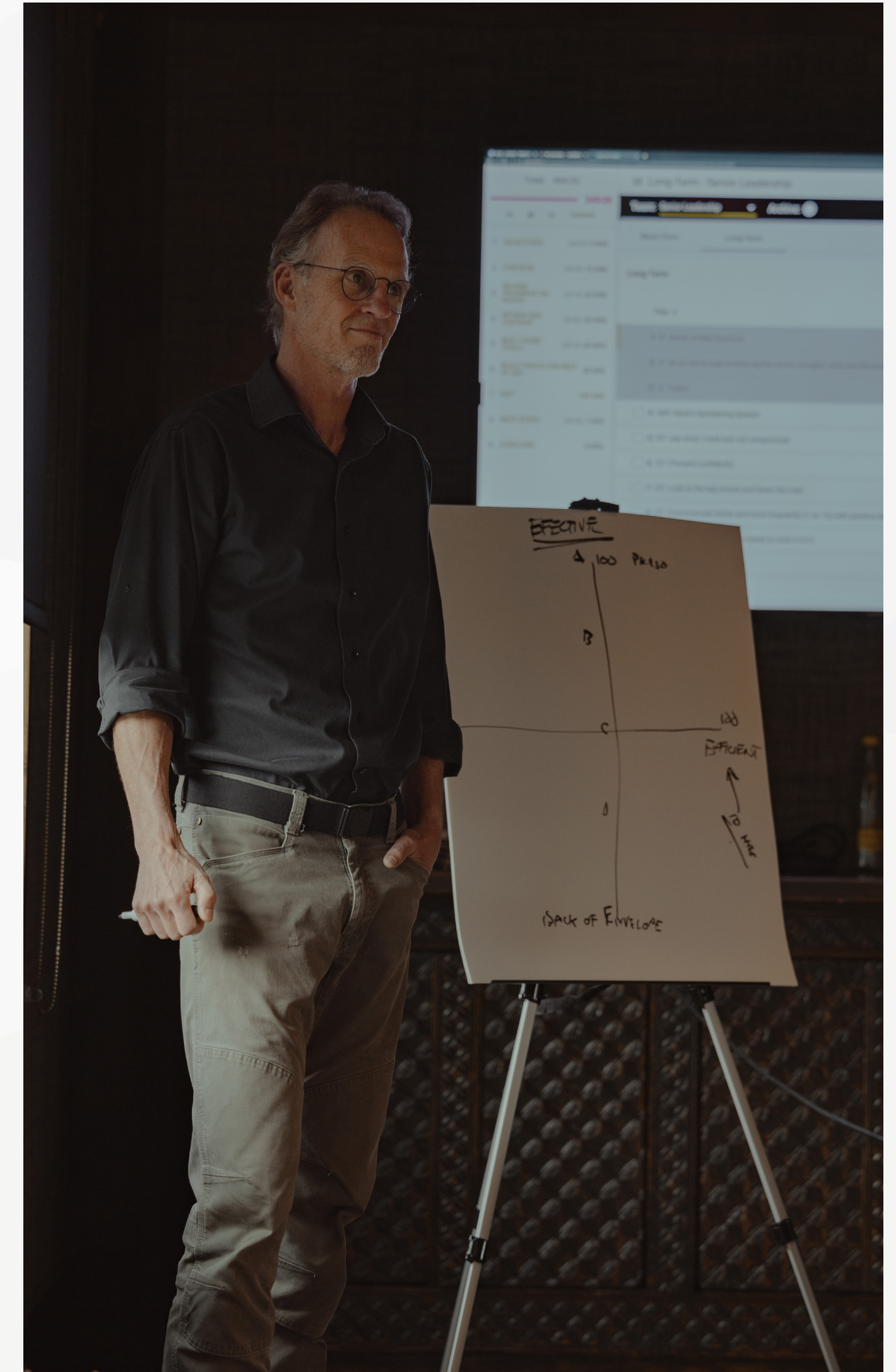
Core Disciplines of Quarterly Planning Meetings

Prepare for the Quarterly. Give everyone a To-Do to clean up Issues in both the Short-Term and Long-Term lists before the meeting. Ask everyone to take assessments and reflect on the Check-In questions in advance.

Continue the 90-day pace even if things are going great. Issues the team wasn't even aware of will likely sprout up. Reorienting the team toward the organization's long-term goals every 90 days is essential for continued growth.

Set Quarterly dates on the calendar well in advance. They are big time commitments, so blocking off the time early will pay dividends when aligning calendars.

Hopefully Helpful Hints

Give everyone a "Make My Rocks SMART" To-Do before the meeting is over. Giving our Rocks the Specific, Measurable, Achievable, Relevant, and Time-Bound treatment ensures everyone in the room knows what Rock completion looks like. This includes breaking down your Rocks into smaller Milestones with actionable due dates that can be delegated to others.

Everyone should schedule time with their leader (e.g., Visionary or COO) to review their Rocks and associated Milestones. Together, they can ensure their Rocks are SMART and no one's taken on more than they can reasonably handle.

If working remotely, try to get together in person for Quarterlies and Annuals. If working together in the office, try to get off-site. A change in setting can enhance team health, alignment, and problem-solving ability.

Consider having someone not on the team act as the facilitator. If the company employs a coach, they can step in so team members can focus fully on the session. If a coach isn't available, appoint one person to run the session and another person to be the scribe.

After every Senior Leadership Team's Quarterly, schedule a State of the Company meeting to share the SLT's developments with the rest of the company. Any changes to the Vision deserve an overview from the leadership team, a review that fosters a stronger company culture.

Takeaway

Quarterly Planning Meetings keep our teams aligned and pointed in the right direction. They also increase team health and contribute to our collective ability to Get Smart Stuff Done. Using Ninety to organize and run Quarterlies makes the process almost easy.

Want to dive deeper into Quarterly Meetings? Check out our Quarterly Planning Meetings Guide for an in-depth look at each section and additional resources.

What's next? Visit the 90u Library or try Ninety today.