Quarterly Planning Facilitation Guide

Quarterly Planning Roadmap

There are 4 stages in the process of Quarterly Planning:

1. Pre-Meeting Review Process
2. Quarterly Review Process
3. Quarterly Planning Process
4. OKR Sprint Plan Process

Pre-Meeting Review Process

Step 1: Schedule **Quarterly Review** & **Quarterly Planning** Meetings

- Both meetings should be scheduled during the last month of the quarter to make sure there's a clear plan going into the first month of the next quarter
- Both meetings should be scheduled within a week of each other, to keep it top of mind but also to give enough time for reflection
- Schedule 2 hours minimum for each meeting

Step 2: Send and collect **Pre-Meeting Reviews Forms** from the CEO and Leadership Team members prior to the meetings

- Using the review questions below, create a form in Typeform or Google Forms
- Give the team 1 week to complete
- Collect responses at least 1 week prior to the first quarterly planning meeting

CEO Pre-Meeting Review

- Review the Strategic Vision. Is it still aligned?
- Review this year's Goals. Is it still aligned? Note anything that is not.
- Review your previous Quarter's OKRs and prepare to provide an update

- What are your last quarter's Wins?
- What are your last quarter's Lessons Learned?
- What are current Issues you see in the business right now?
- What should the company Start, Stop, Keep doing?

Leadership Team Pre-Meeting Review

- Review your previous Quarter's OKRs and provide a status update
- What are your last quarter's Wins?
- What are your last quarter's Lessons Learned?
- What are current Issues you see in the business right now?
- What should the company Start, Stop, Keep doing?

Step 3: Print out the **Quarterly Planning Agreement** for each participant to sign prior to starting the quarterly planning

Quarterly Planning Agreement Template

I __________________, am attending a quarterly planning meeting on _____________, 2023.

I am committed to following these agreements during this meeting.

● I will not cut anyone off.
● I will not cast blame or use individuals' names. We are a team.
● I will have an open mind throughout the entire meeting.
● I will be present and pay attention even when topics do not pertain to me directly.
● I will leave my ego at the door.
● I will not be defensive. The more we learn about how to improve, the better it is for everyone.
● I agree to be part of this team.
● I agree to be respectful, but also to be honest.
● I will participate, even when it may not be comfortable.
● I will commit to what is best for the team even if it makes things harder for me.
● I am willing to get feedback on the projects and tasks that I will complete or have completed.
● I agree to be open to all ideas and opinions, even when I do not agree with them.
● I understand that I am here because I am a valuable member of the team and my participation is needed.

Printed Name:___________________________________

Signed:__________________________________

Step 4: Prepare the **Quarterly Planning Worksheet** for the meetings

- [Quarterly Planning Worksheet Template]
- Add in the previous quarter's Rocks into the **Quarterly Review tab**
- Add in the Company's Yearly Goals in the **Yearly Goals Review tab**

Quarterly Review Process

Step 1: Review the status of each Previous Quarter's Rocks. Move each Rock to one of the 3 sections:

- **Not Completed**
- **Completed**
- **Completed & Further Steps Needed**

Note: Whenever a point requires in-depth discussion, add it to the **Issues List** for later review.

Step 2: Review your "**Not Completed**" list, considering each Rock individually: ***Are we going to complete this Rock this next quarter, or remove it as a Rock?***

If we're not going forward, add an "**N"** to indicate so, then answer the below questions:

- What were the roadblocks?
- How could additional planning prevent those roadblocks?
- Why was the goal important to us last quarter, and why is it not important now?
- What discussion or planning should have been had prior to adding this as a quarterly goal?

If we're moving forward with this Rock in the next quarter, add a **"Y"** to indicate so, then answer the below questions:

- What were the roadblocks?
- How could additional planning prevent those roadblocks?
- What are the next steps to getting the Rock accomplished?

- What is our timeline for completion?
- Add the Rock to your **Rocks First Draft** list.

Step 3: Review your "**Completed**" section, considering each Rock individually: ***What lessons and wisdom can we draw from these completed Rocks?***

- Celebrate the win and outcomes. What worked well that we should keep doing?
- Discuss any challenges, roadblocks, or lessons learned
- Of the challenges and roadblocks, how could better processes or planning help achieve these outcomes more effectively or efficiently?

Step 4: Review your "**Completed & Further Steps Needed**" section, considering each Rock individually:

- Determine the next steps for the Rocks.
- Discuss any challenges and roadblocks for these next steps.
- Of the challenges and roadblocks, how could better processes or planning help achieve these Rocks more effectively or efficiently?
- Determine a timeline for the Rocks.
- Move to **Rocks First Draft** list.

Step 5: Review the status of each of your **Yearly Goals**, asking the following questions for each goal:

- Given how far through the year we are, is this goal on track?
- What has been accomplished for each yearly goal?
- If On Track, what are the next steps this next quarter? If it's not already, add to **Rocks First Draft** list
- If Off Track, what were the roadblocks or challenges? What are the next steps to get back on track or to achieve this goal? Add to **Rocks First Draft** list
- If Off Track and deeper conversation is needed, move to **Issues List**

Step 6: Review the **Company Scorecard**, considering each of the main KPIs.

- Did we hit the target for this KPI?
- If yes, what worked well that we should keep doing?
- If no, what were the challenges and roadblocks?
- What additional planning or processes could have prevented these roadblocks?
- Any key next steps or objectives that aren't already captured, add to **Rocks First Draft** list
- If deeper conversation required for any KPIs, move to **Issues List**

Step 7: Review the **Issues List**, discussing each point individually.

- What's the issue, challenge, roadblock?
- What are the potential solutions and next steps?
- Add key next steps that could be a potential Rock, add to **Rocks First Draft** list

Step 8: Review the **Rocks First Draft** list

- Recap and review the Rocks on this list
- No discussion is needed here, just recap so everyone is aware of what's on this list
- If there are any other priorities that didn't get captured as a Rock here, discuss and add it

End the Quarterly Review Meeting.
Give the team some time to sit with this **Rocks First Draft** list before coming togehter again for the **Quarterly Planning Meeting**.

Post-Meeting Action:

- Send the **Feedback Form** to all participants and get everyone to complete within 24 hours
- Review feedback with the CEO/Visionary
- Share **Rocks First Draft** list with the participants so they can review and sit on it till the **Quarterly Planning Meeting**
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Quarterly Planning Process

Step 1: Recap the **Rocks First Draft** list

- Read over the potential Rocks on the list
- Add anything that may have come up between the last and this meeting

Step 2: Recap the **Yearly Goals**

- Read over the Yearly Goals
- Confirm everyone is still aligned with these being the company's Yearly Goals

Step 3: Recap the **Company KPI Scorecard**

- Review where we're at with each KPI
- Note which KPIs need Targets for the quarter

Step 4: Everyone completes the **Rocks & KPI Brainstorming Sheet** independently:

- Sit independently for 20 minutes and think about the **Rocks First Draft list, the Yearly Goals, and the Company KPI Scorecard**
- Brainstorm and list all the potential Rocks (projects and tasks) YOU can own
- Brainstorm and list all the potential Rocks you can contribute to or support
- If you are responsible for any KPIs, come up with potential targets for your KPIs
- Make sure your Rocks contributes to either moving the needle on the Yearly Goals or KPI targets
- For the moment, leave the LH / HR boxes blank

Step 5: Once the worksheet is completed, bring team back together. Instruct everyone to review their list and place a checkmark by every piece of low hanging fruit (LF), and any home runs (HR):

- **Low Hanging Fruit**: Easily, quickly accomplishable goals.
- **Home Run:** Goals which would result in a major impact for the company if achieved successfully.

Step 6: Everyone creates their **Rocks Second Draft** list

- Add everything that is both LF and HR to your Rocks Second Draft list.
- Now, consider your other tasks. Thinking realistically about timing and commitment required, add Rocks you believe you can realistically achieve, and which meaningfully drive Yearly Goals forward to the Rocks Second Draft list

Step 7: As a team, discuss everyone's **Rocks Second Draft** list one person at a time

- How does adding this Rock get us closer to achieving our Yearly Goals?
- Is the idea reasonably accomplishable in the next quarter?
- What outsourcing or budget will be needed?
- What roadblocks can you foresee?
- After feedback and discussion concludes, revisit with the person responsible for the Rock. Ask for final commitment, and get a signoff from the executive team
- Add confirmed Rocks to the **Finalized Quarterly Rocks** list

Step 8: Review the **Finalized Quarterly Rocks** list

- Recap and read out the **Finalized Quarterly Rocks** list
- Recap the **Rocks First Draft** list and make sure it's all accounted for
- Recap the **Yearly Goals** and make sure it's all accounted for
- Recap the **Company KPI Scorecard** and make sure it's all accounted for and there's clear targets for each KPI
- After feedback and discussion concludes, revisit the **Finalized Quarterly Rocks** list and ask for final commitment from the team

Step 9: Add Rocks from **Finalized Quarterly Rocks** list to the **OKR Dashboard**

OKR Sprint Plan Process

Step 1: Add the Rocks from the **Finalized Quarterly Rocks** list to the **OKR Dashboard**

- The **OKR Dashboard** can be found in the company's [Strategic Vision Planner [TEMPLATE]]
- Set up each Rock as the **Objective** of the **OKRs**
- Make sure each **Objective** clearly defines an **Outcome**

Step 2: Add **Owners and Deadlines** for each **Objective**

- The **Owner** is the person responsible for making sure the outcome is achieved
- The **Deadline** for each **Rock/Objective** is ALWAYS the last day of the quarter

Step 3: Assign the **Owners** of each **Objective** to breakdown their Objectives into **Key Results (KR)**

- Each **Owner** breaks down their **Rock/Objective** into clear **Key Results**, aka **Milestones**
- What tasks, action steps and deliverables need to be completed in order to achieve the Objective's outcome?
- Set up the **KR** in sprint size milestones, meaning each task, action step or deliverable can be completed in a weekly **Sprint**
- Order the **KRs** in chronological order so it's clear what **KRs** are being worked on each Sprint
- There are 12 weeks in a quarter, aka 12 Sprints. It's best to hold 2 Sprints for Quarterly Planning, and to keep 2 Sprints as buffer for unexpected roadblocks. So that leaves 8 Sprints to complete an Objective, therefore there should not be more than 8 Key Results per Objective

- Deadlines for each **KR** should always be the end date of a **Sprint**. Exceptions can be made of time sensitive KRs
- Assign **Owners** for each KR. Owners are not always the one that has to do the KR, Owners are the ones responsible for making sure the KR gets completed

Step 4: Visionary and Integrator reviews all the **OKRs** to make sure they're set up effectively

- Make sure all **Objectives** have a clear **Outcome** that contributes to the **Yearly Goals** or **KPI Targets**
- Make sure all **KRs** are broken down effectively, have clear deadlines that line up with **Sprints**
- Make sure that **OKRs** are set up so that when all **KRs** are completed, the **O** should be achieved
- Review Sprint by Sprint and make sure that workload for each Sprint is aligned with the team's bandwidth
- If there are Sprints where there are more KRs and tasks than the team has capacity for, re-arrange the Sprints and tasks

Step 5: Use the first **Level 10 Meeting** of the quarter to reveal and review the **Finalized OKRs** and get full commitment

- Instead of doing a Rocks/OKR update, use that time to reveal and review the Finalized OKRs
- Make sure everyone is clear on the outcome for their OKRs. Use the time to explain what done/success looks like if needed
- Get buy in and commitment from the team