Your questions help drive the workshop topics, questions and peer reviews.

Contact
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Specific Session Topics
https://onstrategyhq.com/ama-contact

Today's hosts:

Jeff Brunings

Head of Growth & Development

Principal Strategist

OnStrategy

Erica Olsen

CEO + Co-Founder

Principal Strategist

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Kim Perkins

Principal Strategist

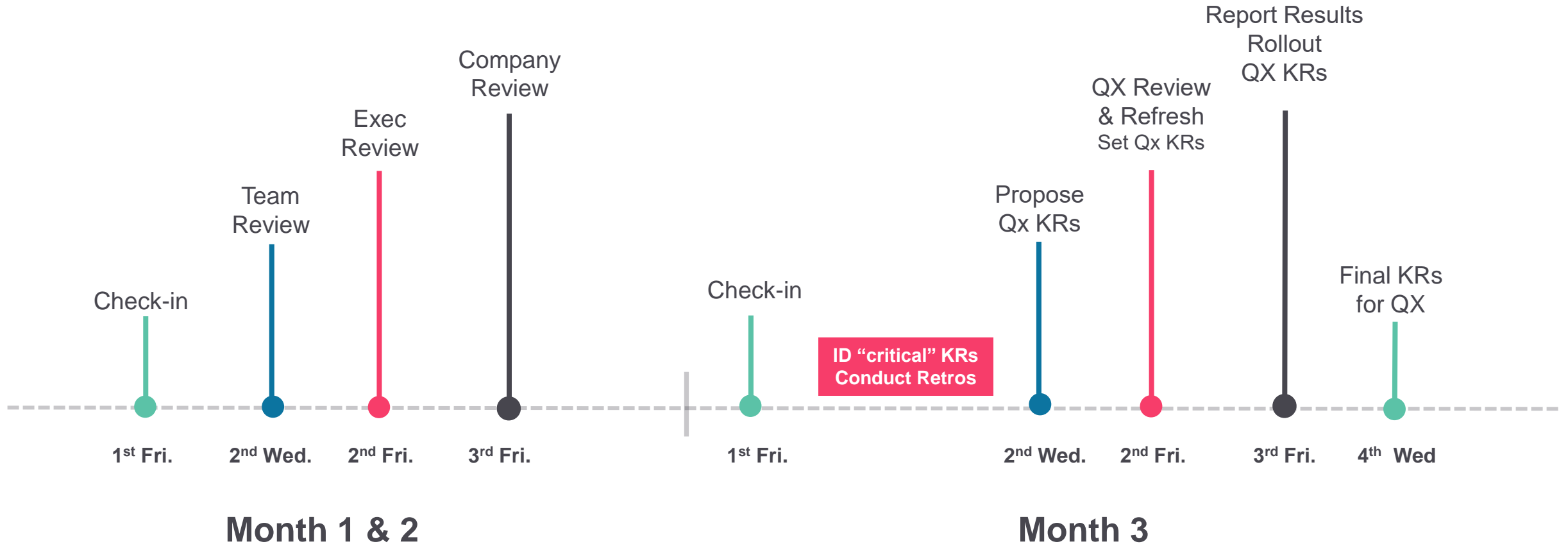OnStrategy

Three Steps to a Killer Quarterly Cycle

1. Review

2. Reflect

3. Refresh

Timing | Approach | Tool | "Content"

Planning & Execution Cycle (StrategySprint^{TM})

Month 1 & 2

- Check-in — 1st Fri.
- Team Review — 2nd Wed.
- Exec Review — 2nd Fri.
- Company Review — 3rd Fri.

Month 3

- Check-in — 1st Fri.
- ID "critical" KRs / Conduct Retros
- Propose Qx KRs — 2nd Wed.
- QX Review & Refresh / Set Qx KRs — 2nd Fri.
- Report Results / Rollout QX KRs — 3rd Fri.
- Final KRs for QX — 4th Wed

Executive Leaders | Team Leaders | Leaders & Staff | ALL

Chief Strategy Officer Collaborative^{SM}

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Architecting Your Planning & Execution Cycle

StrategySprint™

Categories			
Process Leads	*Champion*: **NAME**	*Strategy Leader*: **NAME**	
What Level is Involved?	*Company*: **YES/NO**	*Team*: **YES/NO**	*Individual*: **YES/NO**
Goal/OKR Readiness	❑ *Completeness of OKRs:* **All Os have 2-3 KRs** ❑ *Ownership of OKRs:* **Each exec owns at least 1 KR** ❑ *Reporting Readiness*: **Quant KRs have data sources**		
Tool	❑ Not centralized	❑ Word/Excel/PPT	❑ Software
Timing & Approach	*Monthly Reporting Date*: **First _____ of the month (TOOL)** *Monthly Checkins*: _____ **of the month (Dedicated meeting?)** *Quarterly Review & Refresh:* _____ **of the quarter (Dedicated meeting?)**		
Approach to All Staff Communication	*Timing*: *Method*: *Report*:		
Design Principles:	*Approach to Os*: Shared	Individual *Number of KRs per person*: Three	Five	No limit *Aspirational & Committed*: Only Committed	Both *Allowable Types of KRs*: Metrics	Deliverables	Milestones		

Step 1: Review Performance

Timing: Monthly

Approach: Dedicated Meeting (60-90mins)

Attendees: Leader & Direct Reports

Tool Using: Configured dashboard or PPT

Input: All goals/OKR have up-to-date data.

Output: N/A

Purpose
20% Look back on performance. 80% Look forward on next 30 days.

Monthly Strategic Agenda

I. Welcome and Opening Remarks (CEO)

- Highlights and lowlights from the previous month

II. Goal/OKR Performance by Goal Owner (<3 mins each)
- Our Objective is ….. <objective> & there are <# of KRs>.
- Our performance to date is …. <status + actual>
- In the last month, we accomplished …. <1 or 2 shout outs>
- Our focus for the next month is … KRs needing attention>

III. Recap on Focus for Next 30 Days & Follow Ups (CEO)

Step 2: Reflect & Learn

Timing: Quarterly; First part of 3rd month

Approach: Dedicated meeting

Attendees: Owners of critical goals/OKRs

Tool Using: Real or virtual whiteboard

Input: OKRs that are critical & back up data.

Output: Recommended changes to the key results, key projects & Qx targets.

Purpose
Zoom out and pause. Reflect on what is working and what is not working.

Retro Agenda

NOTE: This is for EACH underperforming Goal/OKR.

I.   **Setting the Stage – Goal/OKR Performance Briefing (Goal Lead)**

II. **Reflect – Lessons Learned**

III. **Act - New Goal/OKR Targets or Actions** (Goal Lead)

Example > For a Key Result

Reflect on <KR Name>

The current state of performance is....

60 min ⏰

What went well?

Communication external stakeholders

Celebrations

What is not going well?

Add more annotations

Storytelling during demo

1. Identify not going well.
2. Sort into ...Roadblock, Chokepoint, Underperforming activity

What KEY lessons did we learn?

Workshop storytelling for devs

1. Brainstorm
2. Identify the top 3-4 KEY Lessons.

Act

30 min ⏰

What are we going to do differently? AND WHO?

From the lessons learned
1. Determine "So What" are we doing to do about them?

New Key Result & Target

Key result here

Target for Qx

Key Actions or Projects (OWNERS)

From not going well...
1. Select the ones to address

Step 3: Refresh

From…

How did we perform?

To…

Should we alter course?

To…

What should we do?

Step 3: Refresh

Timing: Quarterly; In place of Monthly

Approach: Half-Day "Offsite"

Attendees: Exec Leaders

Tool Using: Reporting Tool & Whiteboards

Input: Performance to date for all goals/OKRs.
Workup on Strategic Issue to be addressed

Output: OKRs for the upcoming quarter.
Forward action on 1-2 strategic issues.

Purpose

(1) Reflect on quarter's performance and refresh Qx KRs.
(2) Address 1-2 strategic issues on your "Strategy Agenda".

Quarterly Review & Refresh Agenda

I. **Lessons Learned & Looking Forward**

- Overall, what lessons did we learn last quarter?

- Based on our performance, should we alter course?
  (re the underperforming areas)

II. **Strategic Issue #1** (Issue Owner)

- Issue Briefing

- Possible course of action & recommendations?

- Next Steps: Monitor; Research further; Take Action

III. **Strategic Issue #2** (Issue Owner)

Strategic "Agenda"

Running list of issues to address

Issue	Issue Owner	Course of Action
How will we address industry consolidation?	Bob	☑
Will the war have implications on our cost profile?	Sarah	☑
Is changing consumer behavior driving commoditization?	Jane	☑
What is our approach to finding talent for middle management in engineering?	Erica	☑
etc…		☑
		☑
		☑

Calendar of Events

Always Thursdays

Remaining March Session: PRO Members Only

March 23 @ 10 a.m. PT - **"Ask Us Anything" Workshop** *[Pro only]*

April 13 @ 8 a.m. PT - **"Ask Us Anything" Workshop** *[Pro only]*

April 16 @ 10 a.m. PT – Decision Making **Deep Dive: How To** *[Pro only]*

Upcoming General Sessions

[CSO Collaborative] Chief Strategy Officer Collaborative

April 6 @ 8:00 a.m. PT - **Leading** Executive Teams
Tools for Decision Making, Alignment and Consensus Building

May 4 @ 8:00 a.m. PT – **Prioritizing** the Best Strategic Moves for your Organization's Life Cycle

June 1 @ 8:00 a.m. PT – Currently Under Review!

Final thoughts

Expect all of today's materials and agendas in your inbox.

We'll email by tomorrow with links to resources we talked about, plus what's coming up this month!

Invite - Share

If you found value in today's session then share it with a friend or colleague who could benefit as well.

Suggestion for topics? Feedback?

Drop us a line anytime – let us know what you think and what you'd like to tackle as a group.
collaborative@onstrategyhq.com

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