



BRIEF

Annual Planning Meetings

By [Mark Abbott](#)

Introduction

Once per year, your team's [Quarterly Planning Meeting](#) should be extended into an **Annual Planning Meeting (APM)**.

During an APM, the current 3-year goals are advanced based on the progress of the last year, new 1-year goals are set, certain key performance indicators (KPIs) are adjusted, and a new set of 90-day goals (aka [Rocks](#)) are agreed to.

With new 1-year goals, your organization's teams will have a clear line of sight on what needs to happen each quarter to turn your [vision](#) into reality.



Context

The APM is essential both from a strategic perspective and for morale.

When you began the BOS upgrade journey, your Senior Leadership Team (SLT) was focused and 100% in agreement about your vision and long-term goals. To maintain focus and alignment, it's important to revisit these Focus Filters each year.

Taking the time to realign everyone with the organization's priorities fosters a considerable improvement in team health. Following an APM, team members understand each other more deeply as people.

At Ninety, our SLT is always energized coming out of Annuals. Motivation levels are high. Everyone knows what they're doing for the next year; everyone is focused and aligned on what's most important. When we get back, we hold a [State of the Company Meeting](#) because that energy is contagious, and we want it to spread throughout the entire company.

The Annual Planning Meeting

The APM typically takes two days. Ninety's APM agenda is similar to a Quarterly Planning Meeting's, but the time horizon encompasses the entire year instead of a single quarter. Companies can also create [custom meeting agendas](#) to fit their specific needs.

Day One's objectives are to review the previous quarter and year, increase our team's health, and make sure our company vision is clear. Day Two's objectives include setting 1-year goals, creating next quarter's Rocks, and resolving critical Issues.

DAY ONE AGENDA

1. **Objectives** — Begin the APM with an introduction from the facilitator leading the meeting. Then, walk the team through the agenda and set goals for the meeting.
2. **Check-In** — Next, invite team members to connect personally with an extended version of the [Weekly Team Meeting](#) check-in. These open-ended questions often bring to light Issues to add to the Long-Term Issues list. They also make clear what each person needs and what a collective "win" for the day looks like. During the APM 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
3. **Quarter and Year Reviews** — Reflect first on the past quarter and then on the past year to see where the team succeeded and where there is room for improvement. Look at numerical goals (financial and KPI-based goals such as revenue, number of paying users, and net promoter score), Rocks, and 1-year goals.

4. **Team Health Building** — Take time to foster team health through exercises such as those associated with Patrick Lencioni's book *The Five Dysfunctions of a Team*. The appendix of our guide [On Annual Planning Meetings](#) outlines several team health exercises recommended by the Ninety team.
5. **9 Core Competencies** — Take advantage of our [Baseline Assessment](#) or [Org Fitness Review](#) to see how well your organization is mastering the essential knowledge and skills needed to build a great company.
6. **SWOT** — Create or update your [SWOT analysis](#) (strengths, weaknesses, opportunities, and threats). Add any Issue, goal, or Rock candidates to the Long-Term Issues list.
7. **Vision and Focus Filters** — Review each component of your vision to ensure everyone is still on the same page. These components are the [Focus Filters](#) guiding all daily decisions. If the SLT is meeting, this review includes adding potential changes to the Issues list.
8. **3-Year Goals** — Review and revise these goals every year to ensure the team has a good sense of scale and scope.

DAY TWO AGENDA

1. **Objectives** — The facilitator aligns the whole team around the meeting's desired outcomes and agenda.
2. **Check-In** — Then, talk through yesterday's progress and whether you're on track to meet everyone's expectations for the APM.
3. **3-year Goals Recap** — Refresh the discussion from Day One so everyone tracks the same goals.
4. **1-Year Goals** — Dive in and prioritize what needs to happen over the next 12 months to take a step closer to your 3-year goals.
5. **90-Day Goals** — Set what needs to happen this next quarter (both numerical goals and Rocks) to achieve your 1-year goals.
6. **Long-Term Issues** — Time to [Raise, Discuss, and Resolve](#) (RDR) Issues. As a team, look at and resolve the Long-Term Issues that weren't turned into Rocks and aren't

candidates for future Rocks. Be mindful of time because once Issues are raised, it's easy to fall down the proverbial rabbit hole. To ensure you address the most important Issues before time is up, we recommend prioritizing them before starting.

7. **Next Steps** – During this short segment, the facilitator reviews all created [To-Dos](#) and any communications the team must cascade to other teams.
8. **Conclude** – Finally, assess whether the Annual Planning Meeting was conducted effectively and met expectations. Each participant grades the meeting on a scale of 1 to 10. Any grade below a 9 should be accompanied by an explanation of how the meeting missed the mark and what could have been done differently.

Core Disciplines of Annual Planning Meetings

1. Get out of the office. Inspire a different frame of reference. It's not a party, though – that can be an element of team health, but don't let it take over the entire Annual.

2. Prepare for the meeting. Have a draft budget ready to be approved, complete the Baseline Assessment or Org Fitness Review, and add candidates for your 3-year and 1-year goals and Rocks to the Long-Term Issues list. Clean house by removing any Issues that are no longer applicable, and decide on the team health activity.

3. Document ideas as the discussion happens. Think about any new Seats the team may need to add to the [Org Chart](#) over the next year. Real-time adjustments make it easier for the team to visualize changes and reduce data entry after the meeting.

Hopefully Helpful Hints

Have a tactic to prioritize Issues. Take advantage of Ninety's Issues prioritizing system ahead of time. Make sure to revisit the priority ratings from the prior Quarterly Planning Meeting.

The first time a team runs an Annual, spend some time explaining each [Business Operating System](#) tool. For example, some team members might be well-versed in


performing a SWOT analysis, but it might be entirely new for others. A brief overview ensures everyone is on the same page.

Takeaway

Annuals are an essential part of your overall long-term planning. By breaking down a 3-year goal into a 1-year goal, and that 1-year goal into Rocks, team members have the benefit of knowing that their everyday actions directly impact the company's future.

Want to dive deeper into Annual Planning Meetings? Check out our guide [On Annual Planning Meetings](#) for an in-depth look at each section and additional resources for running great meetings.

What's next? Visit the [90u Library](#) or [try Ninety today](#).

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