Team Quarterly Planning
Check In Document

What are your expectations for this planning session?

What clarity do you need before we wrap our planning session in order to be more effective as a leader here?

Going Well

Since the last time we had planning: (typically in the last 90 days):

#1 best personal WIN?

#1 best professional WIN?

As of today, what is working within the business? The good stuff and wins!

Across the US business as a whole

Within your team or department

Give a shout out to the 1-3 best people this last quarter <u>not</u> reporting to you and say why:

NOT Going well

As of today, what is not working in the business? What problems need to be discussed and/or solved for? Consider these as the issues, topics to discuss, opportunities, obstacles and barriers to more success. *(Please frame your points as problem statements)*

Across the US business as a whole

Within your team or department

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People Topics

We measure people via *"gets it, wants it, capacity to do it, and fits our core values."* With this in mind, who does not fit in their seat and/or with the business at all? Who is not succeeding in their role (wrong seat)? (Consider people in your org and outside your org)

What is the highest impact people move we would make if we had the guts and/or money?

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Challenges & Opportunities

Is there anything that we aren't talking about (or talking about enough) or isn't being directly addressed at the table? *(Consider something you're uncomfortable bringing up)*

As of today, what are the top two things we can do to help increase new sales revenue in the next 2 quarters?

As of today, what is the biggest obstacle to you having more success as a department?

What new priorities / interruptions do you think will pop up in the next 60 days that we should be aware of?

As a business what is the biggest gap that, if addressed, could significantly change our trajectory?

Meeting Wrap-Up

∗∗We'll work through this part together in the session.∗∗

How did we do, as a team, running the US Business this quarter?