



Quarterly Business Review - Agenda

Agenda - Quarterly Business Review

As every quarter ends I recommend doing a quarterly business review, where you reflect on and evaluate how you went last quarter in relation to your goals, and then you set your objectives for the next quarter.

Agenda – Quarterly Business Review

Step 1:

- Review previous quarters goals
 - Did you hit them all?
 - Why? Why not? (capture any learning points)

Step 2:

- Review the Business Plan
 - Core values - are we living them?
 - Progress against “In 3 Years Time” descriptors
 - Progress against “In One Year” goals
 - How are we progressing overall against the business plan? (Score out of 10)
- What’s going well?
- What’s not?
- Is any remedial action required?

Step 3:

- Review your business financials
- Review Management Information (MI) spreadsheet

Step 4:

- What did we do well?
- What could we double down on?
- What did we learn?
- What could we do differently moving forward?

Step 5:

- Set goals for next quarter

Step 6:

- State of the Nation
 - Update team on results and highlights from previous quarter
 - Update team on plans/goals for next 90 days (or year)