



Planning Meeting Agenda Sample

Tuesday, January 5

4:00PM Arrive

- Meet and Greet
- Overview: Expectations / Takeaways
- Review of Playbook / Survey Individually

5:00 PM Team Review of Survey

- Identify Key Areas of Focus

6:30 PM: Dinner

Wednesday, January 6

7:00AM: Breakfast

8:00AM – 12:00PM Current Reality or “Here”

- Lessons Learned: Brags / Bloopers
- What is working? What needs work?
- Review of what we have accomplished: GROW Card Review of KPIs

Key Areas of Focus: Customers, People, Systems and others as identified

Know Thy Customer

- Understanding our current and potential customers’ pains, needs, wants
- Who is our targeted customer? Who have we added?
- How can we keep our desired customers? Review of lost jobs
- How can we find attract and keep the right customers? Brand/ Differentiation
- What needs to be changed / added/ kept?

Know Thy Competitors

- Competitor Recon: SWOTT them!

Know Thy Selves

- SWOTT Ourselves
- People Program Status: What is working, what needs work?
- Culture Review

1:00PM – 5:00PM: Processes / Systems / Programs

- Id Top 3-5 areas of Focus and Build Framework

6:30PM: Dinner

Thursday January 7

7:00AM Breakfast

8:00AM – 11:30PM Desired Destiny or “There”

- Goals: Numbers, Market Position
- What are the goals by end of 2023? Start building the Monarch playbook

11:30PM- 12:30PM Lunch

12:30PM - 2:00 PM: Next Steps: Tasks Assigned 2:00PM: Adjourn