



**ONGOING STRATEGIC UPDATES**

**MONTHLY BUSINESS REVIEW**

**QUARTERLY BUSINESS REVIEW**

**ANNUAL PLANNING**

**OBJECTIVE**

Ongoing status and collaboration updates on key initiatives

Ongoing financial, KPI and initiative progress review to drive team accountability

Longer-form business review with opportunity to step back and refresh plans

Series of annual planning processes (strategy, budgeting, KPIs, talent)

**FREQUENCY**

Every two weeks  
60 min

Monthly  
90 min

Quarterly  
Half day/full day

Annual  
Various multi-week processes

**CONTENT**

- Progress status
- Collaboration/feedback
- Plan/assign/track actions

- Financial & KPI review
- Initiative status updates
- Address/resolve issues

- Financial & KPI review
- Adjust as needed for next quarter (plans, priorities, budgets, assignments, etc.)

- Will vary by process, business dynamics, etc.