



BRIEF

# State of the Company Meetings

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## Introduction

Every 90 days, we hold a **State of the Company Meeting (SCM)** with our entire organization. SCMs are a guided tour through the recent past, a reminder of future goals, and an opportunity to celebrate, teach, and inspire.

SCMs keep us aligned and inspired toward our [Vision](#). During the meeting, we share how the company did last quarter compared to projections and reshare our [Focus Filters](#), 3-Year, 1-Year, and new 90-Day Goals (aka [Rocks](#)). SCMs are integral to building a positive organizational [culture](#) in which every team member has bought into the Vision.

Maintaining transparency and alignment through SCMs is a critical piece of the puzzle toward building a Stage 5 Organization – the highest [Stage of Development](#) for most small or mid-sized businesses.

## Context

Great companies are led by Senior Leadership Teams (SLTs) that are 100% aligned around a compelling Vision. We rely on them to align their departments to the organization's Vision.

We hold our SCMs after every team's had its [Annual](#) or [Quarterly Planning Meeting](#) to review the previous quarter, assess mastery of the [9 Core Competencies](#), create new Rocks, resolve long-term [Issues](#), and more.



## The State of the Company Meeting Agenda

Our 90-minute, whole-company SCM is intended to remind our team members who we are, where we're going, and how we plan to get from here to there. Ninety is a work-from-anywhere company, so our SCMs are always virtual. We want our team to leave the meeting feeling inspired for the coming quarter. To achieve this, some companies weave the narratives of the prior quarter's highlights. Let's take a look.

### **1. Segue** – 5 minutes.

While we deeply believe that "Early is on time, on time is late, and to be late is to be forgotten," we give ourselves time to gather the group. Our Visionary opens the meeting early, and we all chat until 5 minutes after the official start. We banter about almost anything, even sharing bad "dad jokes" and interesting facts.

### **2. Introduction** – 5 minutes.

One or more of our SLT members join our Visionary in setting the tone of the meeting and reminding everyone of the meeting's objectives and agenda.

### **3. Results** – 15 minutes.

We recap our whole-company financial goals and operational [Key Performance Indicators](#) (KPIs). Next, we share how we did with our Company Rocks. We then share what we call Key Wins and Learnings – areas that we succeeded in and others that we are learning from. Finally, before taking any questions, we share how the SLT graded the most recent quarter on a scale of A, B, C, D, or F – and why. If we've just met for our Annual Planning Meetings, we grade the entire year as well.

### **4. Core Values Call-Outs** – 10 minutes.

We restate our [Core Values](#), sit back, and listen as our team members give shout-outs to colleagues who exemplified one or more of our Core Values during the prior quarter.

### **5. Our Vision** – 20 minutes.

Restating our Vision is crucial for keeping it top of mind for our team members. We cover the rest of our Focus Filters, including our Compelling Why, industry and niche, and goals.

### **6. Goals** – 20 minutes.

During a quarterly SCM, we review our [Compelling and Audacious Goals \(CAGs\)](#), 3-Year Goals, and 1-Year Goals and share and explain our new Rocks. If it's our [Annual](#), we share our updated 3-Year and 1-Year Goals for the first time. We're huge proponents of creating high-trust relationships with our stakeholders. In that effort, we aim to be radically transparent with how our company goals align with individual and department Rocks to help team members relate their [roles, accountabilities, and responsibilities](#) with our Vision.

## 7. Q&A – 15 minutes.

Finally, we open the floor for questions. We endeavor to have all SLT members answer questions, not just our Visionary. When we don't have a good answer to some questions, we create a [To-Do](#) to find a solution. When the questions are done, we close with a final inspirational moment fitting for our team and culture.

# Hopefully Helpful Hints

**Schedule Quarterly Planning Meetings and SCMs in advance.** Over the years, we've found that it's best to maintain a rolling 12-month calendar that includes the dates for each team's Quarterly and Annual Planning Meetings and our organization's quarterly SCMs. With the dates on the calendar, we minimize the chance of conflicts.

**Transparency builds trust, and trust builds great companies.** Some companies may be hesitant to share their results and goals openly. We sincerely believe it's nearly impossible to build a [high-stage Culture](#), let alone a [Stage 5 organization](#), if we're not willing to be open about where we've been and where we're going next.

**Commit to holding SCMs, and make them a place where the magic happens.** Encourage participation from SLT members, and be sure to craft an experience around each quarter's meeting. Keep it fresh, fun, and memorable. Investing in making SCMs meaningful turns them into a celebratory touchstone practice of the organization that team members look forward to attending.

# Takeaway

State of the Company Meetings are critical for building a great company. Use this quarterly opportunity to recap the past and share the path for the company's future. Mastering this piece of the Meetings Core Competency motivates us to progress our company through the Stages of Development.

Quarter by quarter, we march steadily toward turning our Vision into reality. Embedding SCMs into every 90-day march keeps organizations focused, aligned, and thriving.

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