



On Quarterly Planning Meetings

WHY THEY MATTER AND HOW WE RUN THEM

On Quarterly Planning Meetings | Ninety





A Message from the CEO

At Ninety, we get how hard it is to build and run organizations. Our cloud-based Business Operating System (BOS) platform contains each of the essential concepts, tools, and disciplines needed to become great company builders.

We believe we're moving into a new Age of Work – what we refer to as [the Age of Understanding, or Work 8.0](#). The coming of this age was inevitable, but the pandemic accelerated its arrival by about ten years as so many people transitioned to remote or hybrid work models.

When we say Work, we mean finding value and purpose in our occupational roles – not just punching a time clock.

One of the most notable characteristics of Work 8.0 is that we now have an almost infinite array of opportunities to find Work. This shift will see more and more people reshuffling where and how they Work.

The good news is we've been studying company building for decades and have a well-informed, time-tested understanding of the essential concepts, tools, and disciplines needed to master great company building.

In short, great companies understand who they are, what they are, where they are, where they want to go, and what it's going to take to get there.

This guide is all about how to master a particular skill, discipline, or toolset. It's one of an array of guides associated with how to build a great company.

Across all our content, rest assured that our relentless focus will always be to simplify the hard work of aligning and focusing teams so organizations can thrive.

Gratefully,

Mark Abbott
CEO + Founder, Ninety

Purpose

This Ninety Guide is part of our series on the meetings necessary to build, operate, and scale a great company. This guide addresses **Quarterly Planning Meetings**.

Every 90 days, we hold Planning Meetings (PMs) to focus on the big picture. We review the first three quarters with Quarterly Planning Meetings (QPMs), and we close out the year with an [Annual Planning Meeting](#) (APM).

Why do we dedicate so much content to meetings? Because every business has them, no matter how big or small. And because meetings can either be the foundation of a company's excellence or the bane of its existence.

Based on decades of company-building experience and data, we have a clear road map for how best to design and run effective meetings that help teams [get smart stuff done](#) (GSSD), achieve breakthroughs, and grow their business.

We're happy to share our road map because delivering free, high-impact company-building information is part of our mission to help organizations focus, align, and thrive.

LET'S DIVE IN.

- **Read it**

- » We've designed this guide to make it easy to quickly absorb the information. Skim for highlights, glance for big ideas, or dive in for a deeper understanding.

- **Save it**

- » Continue to use this guide as a high-value reference. Highlight, underline, or circle what's most useful. We've even left space for notes.

- **Share it**

- » The information and advice on these pages should be shared. We deeply believe that useful resources should be accessible to all.

Table of Contents

Quarterly Planning Meetings	5
Preparing for a QPM	6
Segment 1: Objectives and Agenda	7
Segment 2: Check-In	8
Segment 3: Quarter Review	9
Segment 4: 9 Core Competencies	10
Segment 5: Focus Filters	11
Segment 6: Operating System Upgrades	12
Segment 7: 90-Day Goals	13
Segment 8: Long-Term Issues	14
The RDR Process	15
Segment 9: Next Steps	17
Segment 10: Conclude	18
Modifying the QPM Agenda	19
Synchronizing Planning Meetings	20
Takeaway	21
Key Terms	22
What's Next?	23



Regardless of an organization's size, research suggests that 90-day cycles are natural for team goal-setting, progress assessment, and strategy adjustments. A Quarterly Planning Meeting (QPM) is a meeting that occurs with that intent, once per quarter, usually over the course of a full or half day.

QPM BENEFITS

Alignment — Around the 90-day mark, even focused, cohesive teams can begin to diverge. It's a natural phenomenon — like an arrow shot from the bow, the farther out an organization is from its launch point, the more likely it is to drift off-target. A QPM provides a timely opportunity to reconnect and calibrate.

Goal-Setting — While we certainly believe in developing a long-term [Vision](#) and goals, the 90-day time span is often ideal for medium-range objectives. It's a long enough period to allow for meaningful work to be done, but not so long that the effort is diluted. A QPM provides an optimal time span for team goals.

Time to Work On — Business leaders typically spend most of their time working *in* their business, tackling the day-to-day. That effort is critical, but over time, the bigger picture — things like the what, why, and for whom — can be lost. A QPM provides the chance to regain perspective and work *on* the business.

It's human nature to lose focus after 90 days. QPMs keep us on track.

Preparing for a QPM

In our meeting model, there are 10 segments of the QPM agenda. To achieve the best results, over the course of the meeting, a team should methodically, cleanly work their way through each segment.

How exactly does that happen? Via a **Facilitator**.

A Facilitator is a person familiar with the QPM process, pre-selected to guide the team through the segments. For us, the Facilitator can be a team member or third-party participant, like a coach or partner.

In addition to selecting a Facilitator, teams can prepare for the QPM by taking our [Org Fitness Review](#). This assessment asks team members to reflect on the company's strength in each of the [9 Core Competencies](#). Participants' responses are reviewed during Segment 4 of the QPM.

Segment 1: Objectives and Agenda

The first segment of the QPM introduces the meeting's objectives and agenda. It sets the stage by ensuring that those present recognize the meeting's purpose and scope — what it's for and what it will cover. Segment 1 not only starts the QPM on the right trajectory, but also sets it up to maintain focus throughout.

HOW IT WORKS

In Segment 1, the Facilitator walks the team through two items:

- **Objectives** — Specific things that should be accomplished by the end of the QPM. Objectives have been set in advance. Examples can include a discussion to be had, decision to be made, goals to be set, or issue to be resolved.
- **Agenda** — An overview of the day's order of events and an explanation of what steps will be taken to accomplish the desired outcomes. Examples can include having a roundtable discussion, completing a survey, or taking a vote.

The Facilitator does not need to exhaustively review each objective — Segment 1 is intended to be a brief overview of what the QPM will involve. For us, this segment typically takes five minutes or less.

The second segment of the QPM is an individual check-in designed to ease team members into what will likely be a lengthy meeting. In addition to helping everyone settle in, Segment 2 helps us establish a more personal, collaborative environment that promotes positive dialogue.

HOW IT WORKS

Segment 2 usually begins with the Facilitator asking for a volunteer to “check in” first. From there, whoever is seated next to the volunteer (or whoever is the next tile on the screen, if the QPM is taking place virtually) shares next, and so on, until everyone present has checked in with the group.

At Ninety, there are always three details each team member shares in their QPM check-in:

- **Two Wins** – The team member shares their biggest personal and professional wins from the past 90 days – two great things they got done or had happen. These details help personalize the experience and are fun to hear.
- **What’s Working and What’s Not** – The team member shares what’s working and not working for them at the organization. Through balanced reflection, this feedback tees up further discussion for later in the meeting.
- **QPM Expectations** – The team member shares what they hope will be accomplished during the QPM. The meeting is an investment of everyone’s time, and it’s helpful to be aware of what each participants wants to see accomplished.

Check-in sets the tone of the QPM.

Time to get down to business. In the third QPM segment, the team reflects on the previous quarter. Doing so provides necessary context and information for discussion. It also reinforces a constructive, goal-oriented approach, as the team notes milestones, celebrates wins, and promotes accountability.

QUESTIONS TO ANSWER

For us, Segment 3 typically aims to answer three questions about the preceding quarter:

- Did our team accomplish what we intended to this quarter?
- What did our team not accomplish this quarter? Why?
- What lessons from the quarter can we apply moving forward?

HOW IT WORKS

In Segment 3, the Facilitator walks through the preceding quarter's Numerical Goals and our 90-Day Qualitative Goals (which we call [Rocks](#)). At Ninety, our Numerical Goals are things like revenue targets, total users, and net promoter score. Rocks, on the other hand, can be things like developing a new app configuration, creating and documenting a Process, or publishing a series of help articles.



For each goal, the Facilitator asks the item's owner to report on whether the desired result was achieved.

- If the desired result was achieved, the item is marked as done. That's a win!
- If the desired result was all but achieved, with only a single simple aspect remaining, the item is marked as done, but a [To-Do](#) is added to ensure follow-up and completion.
- If the desired result was not achieved — which can happen, especially when you stretch — the item is left unmarked and counts against the quarter's Rock completion score.

Once the team has reported on every item, the Facilitator summarizes the results. At Ninety, we celebrate when we accomplish our Numerical Goals and at least 80% of our Rocks (though we strive for 90% or more). Those figures consistently represent significant work and progress toward our long-term Vision for our company.

After the summary, to round off the review, the Facilitator asks those present to issue the quarter a letter grade (A–F). To avoid groupthink, each person writes a grade on their own piece of paper or digital note. Everyone then takes a turn sharing their grade with a bit of context.

To conclude Segment 3, the Facilitator asks if there are any new Issues that have arisen during the segment that should be added to the Long-Term [Issues](#) list. If so, they're recorded in Ninety.

Segment 4: 9 Core Competencies Review

At Ninety, we believe that a business develops into a great company based on the extent the organization masters what we call the [9 Core Competencies](#) of a great company. In the fourth QPM segment, we discuss the results of the [Org Fitness Review](#). Depending on the organization, the team may have already taken the Review in preparation, or they may complete it on the spot.

HOW IT WORKS

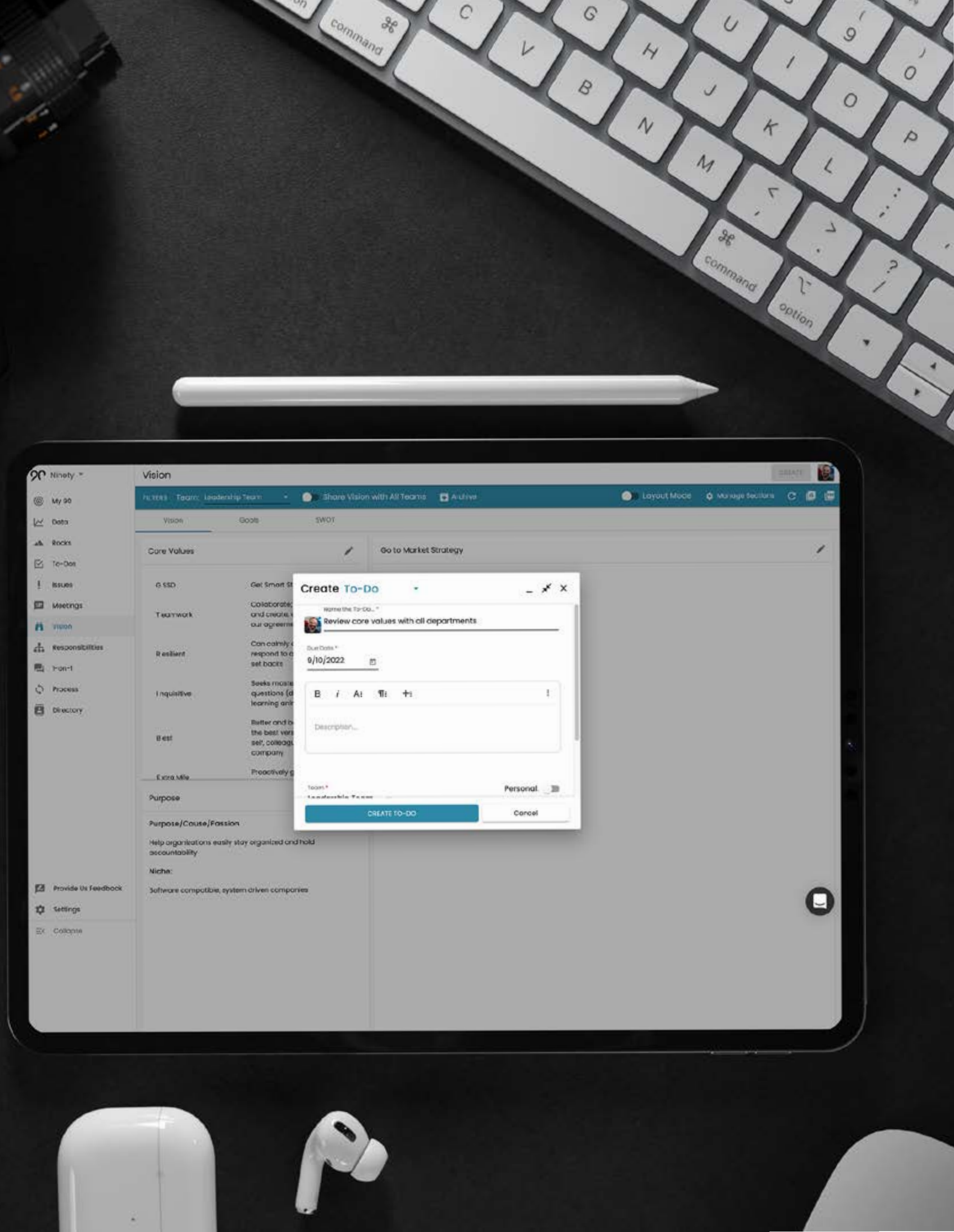
In Segment 4, the Facilitator directs team members to their Review results and leads a reflective discussion focused on identifying areas of opportunity.

At Ninety, we find these questions useful as we debrief the results:

- What results represent the most consensus? Why?
- What results vary most significantly from person to person?
- According to the assessment, what are our organization's greatest areas of opportunity?

Want to learn more about assessments that can help your team focus, align, and thrive? Check out our [Assessments Brief](#).

- 1 VISION**
Our ability to articulate and fully align every person in the company around a single compelling [vision](#).
- 2 CUSTOMER**
Our ability to know who our [Ideal Customer](#) is and to serve them consistently at the highest level.
- 3 GOALS**
Our ability to establish, track, and achieve near-term, medium-term, and long-term [goals](#).
- 4 PEOPLE**
Our ability to clearly define our company's Core Functions and [responsibilities](#) and have the right people fulfill them.
- 5 STRUCTURE**
Our ability to clearly define organizational structure around Core Functions and getting the right people in the right seats.
- 6 DATA**
Our ability to define, align to, and track [metrics](#) that give us an actionable pulse on the business.
- 7 MEETINGS**
Our ability to conduct effective, efficient [meetings](#) that help us thrive.
- 8 PROCESS**
Our ability to identify, document, and follow the [processes](#) that define how we do business.
- 9 EXIT**
Our ability to strategically plan for a future sale or leadership transition.



Segment 5: Focus Filters

For the fifth QPM segment, everyone present revisits and reaffirms our **Focus Filters**. These are a collection of essential [agreements](#) that succinctly summarize the company's Vision, values, and goals. Segment 5 helps ensure team alignment, while also providing the team with an opportunity to thoughtfully calibrate the company's central tenets as needed.

HOW IT WORKS

For Segment 5, the Facilitator presents the Focus Filters, items that essentially define the company. Ideally, these items are already very familiar to everyone present because they've been promoted consistently. In Ninety, these can be found in the [Vision tool](#).

For us, as the Facilitator reviews and solicits input on a Focus Filter, usually, the team members just verbally affirm their understanding and belief that it should remain in place, as is. That's all there is to it.

Sometimes, though, a team member may suggest altering a Focus Filter. It may benefit from an update in light of changing market conditions or company developments, for example.

In that case, the Senior Leadership Team (SLT) discusses the proposed Focus Filter alteration and makes a decision. If the change is adopted, it's documented and plans are made to communicate the change to the rest of the company, usually at the next [State of the Company](#) meeting.

Segment 6 focuses on improving how the company operates through the lens of our growing collection of company-building concepts, tools, and disciplines (collectively referred to as CTDs). Specifically, the team reviews the CTDs within the Mastery tool and identifies the extent to which they are being implemented effectively across and up and down our organization.

HOW IT WORKS

Organizations powered by Ninety tend to use most, if not all, our CTDs. It's not uncommon to prioritize the mastery of certain competencies over others, though — even at Ninety, depending on our objectives, we may occasionally want to strengthen a CTD we thought we were pretty good at.

Segment 6 of the QPM allows the team to determine if the organization should focus on strengthening any CTD, including those already implemented. To guide the discussion, the Facilitator presents three options.

1. **Cascade** — CTDs are often first adopted at the SLT level. Here, the team determines whether any CTDs should be pushed to the rest of the organization, too.
2. **Mastery** — Sometimes the best approach is not to add a CTD, but rather to further master it. Here, the team discusses how effectively the organization employs its existing CTDs and where it might improve.
3. **Expansion** — Adding CTDs can enable the organization to address new (or lasting) challenges, as well as spur growth. Here, the team decides if a new CTDs should be implemented.

The facilitator guides the discussion by presenting three options: cascade, mastery, expansion.

In the seventh QPM segment, the team sets goals for the upcoming quarter. While every segment is important, Segment 7 is especially significant, since it establishes the company's 90-Day Goals (aka Rocks) and provides the metrics for measuring success at the next QPM.

HOW IT WORKS

Segment 7 is often one of the most energizing parts of the QPM. It's exciting to think aspirationally and set new goals. This is when we chart the next big steps toward our envisioned future.

The Facilitator leads the team through two categories: Numerical Goals and Rocks. We like to start with the former because new Rocks sometimes emerge from Numerical Goals.

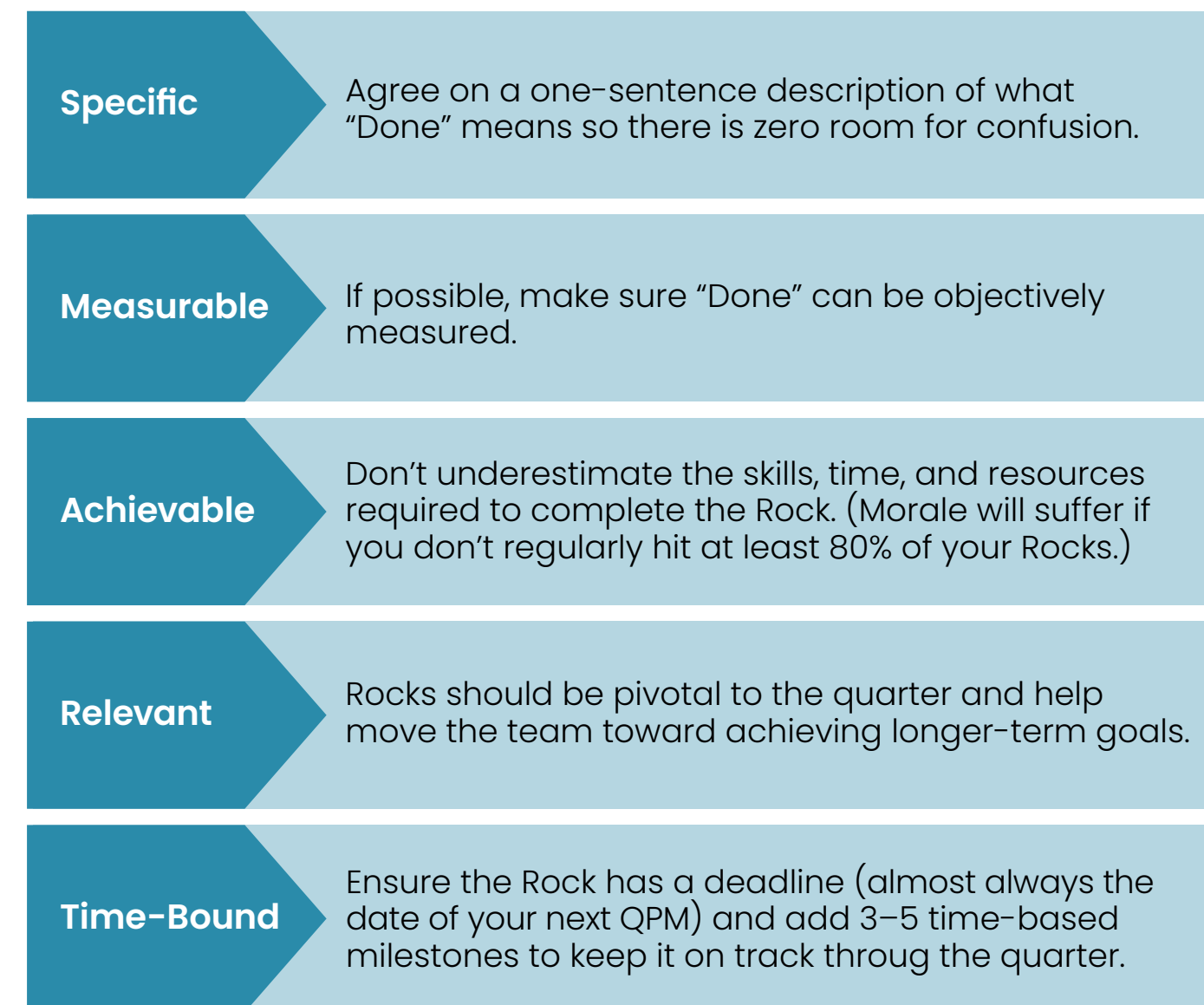
- **Numerical Goals** – These are specific numbers that define what a strong quarter looks like numerically. For us, QPM Numerical Goals consist of 2–3 financial goals (e.g., revenue, gross profit, etc.) and 2–3 KPI-based goals (e.g., prospects in the funnel, new clients, etc.). For this part of the QPM, it's useful to have key data from the previous quarter to reference.
- **Rocks** – These are the primary organizational priorities that should be accomplished by the end of the coming quarter. At Ninety, for the SLT, Rocks usually consist of 3–7 company goals and 3–7 for each member or department. We emphasize capping them at these numbers in order to keep our efforts focused and increase our likelihood of success.

IDENTIFYING ROCKS

To identify Rocks for the upcoming quarter, we find it best to employ a systematic, facilitated process. Otherwise, we may end up with an hours-long discussion that results in countless Rock candidates (and a lot of dialogue) but no definitive conclusions.

At a Ninety QPM, the Facilitator guides the team through three steps to identify and set Rocks:

1. **List** – What are our main priorities for the upcoming quarter? The team drafts an unlimited list of Rock candidates. Ideas often stem from 3-Year Goals, 1-Year Goals, the Long-Term Issues list, and currently undone Rocks.
2. **Order** – Which of these potential Rocks are most pressing or will most help us achieve our 1-Year Goals? We narrow the list with our 1-year destination in mind.
3. **Make them SMART** – Finally, we make our Rocks SMART so everyone in the room knows what completion looks like when we say "Done." SMART stands for:



As coaches, we can almost guarantee that the better you get at building SMART Rocks, the higher the probability you'll complete at least 80% of them each quarter.

Segment 8 is dedicated to addressing the biggest, highest-impact Issues facing the company, those that require the type of time and attention rarely available in the daily hustle. As such, Segment 8 has the potential to produce significant breakthroughs.

HOW IT WORKS

In Segment 8, the team works through the Issues in the Long-Term Issues list using a deliberate, methodical process called **Raise, Discuss, Resolve (RDR)**. [Issues](#) can be things like organizational problems, challenges, and obstacles, or they can be ideas and new opportunities. They all get addressed.

Most of the Issues will have been added at some point during the preceding quarter with the intent of addressing them at the next QPM or APM, while some will have been added during the meeting itself. Whoever adds an Issue to the list is its owner.

Since some Issues may be outdated or unfamiliar, the Facilitator starts Segment 8 by walking the team through the entire list. We remove any Issues that have already been resolved or turned into Rocks. The remaining Issues are then ranked according to priority.



RANKING ISSUES

We find it most useful to classify Issues in the Long-Term Issues list by assigning each one a number from 1 to 9.

- **9** = 3-Year Goal candidate (to be discussed next APM)
- **8** = 1-Year Goal candidate (to be discussed next APM)
- **7** = Company Rock candidate
- **6** = Individual Rock candidate
- **5** = Must RDR during this QPM
- **4** = Must RDR early in the RDR section
- **3** = RDR if we have time or move to WTM
- **2** = Rock candidate or Issue for next quarter
- **1** = Rock candidate or Issue for beyond next quarter

Since Issues classified as **8** or **9** are only discussed during the APM, the team does not aim to resolve them during the QPM. Similarly, Issues classified as **2** or **1** are designated for a future quarter.

That means we typically start by addressing Issues classified as **7**, then move to **6**, then **5**, then **4**. Since we've been holding QPMs for a while, by the end of Segment 8, we rarely need to push any Issues classified as **3** to the [Weekly Team Meeting](#) (WTM).

Priorities set, we Raise, Discuss, and Resolve our way down the list until the Long-Term Issues list is clear.

Addressing Issues can be one of the most challenging tasks a team undertakes. Over the course of a lengthy, in-depth discussion, personality tendencies may emerge, opinions and feelings can run strong, and the real Issue can occasionally be lost.

To resolve Issues efficiently and effectively, we encourage teams to employ the **Raise, Discuss, and Resolve (RDR)** process. As with any process, the more an organization practices RDR, the more natural it becomes.

RAISE

The first step in the RDR process is to **raise** and clarify the Issue. This responsibility belongs to the Issue's owner. There are several ways to raise an Issue; it's up to the team to identify the best method. Here are a few options:

- The owner states the Issue in the briefest form possible, aiming to capture its essence. This approach requires a solid grasp of the Issue and the ability to be succinct. It may be easier for some than others.
- The owner frames the Issue as a question posed to the team, provides all the relevant background information, and then closes by posing the same question again. This approach is great for teeing up discussion.
- The owner talks through five specific prompts: Who, With, One, What, and Why. This approach progressively unpacks the Issue and helps the owner — and others present — verbally process it in real-time. This is the method we favor at Ninety.

- » **Who** — Who are we solving for? Usually, the Issue's owner.
- » **With** — With whom do you have this Issue? This may be an individual team member or a whole team, represented by the team leader.
- » **One** — Summarize the Issue in one sentence. The one-sentence limitation, though challenging, simplifies the Issue, making it easier to solve.
- » **What** — What does the Issue owner need to resolve the Issue? The owner may need information, assistance, confirmation, or something else entirely.
- » **Why** — Why are we talking about this Issue in this forum? This highlights why the Issue needs to be discussed with the entire team.

Regardless of the method used, the team should have the opportunity to ask the owner follow-up questions. The Facilitator manages this process to ensure that everyone present has complete clarity on the Issue that needs to be resolved and the associated context.

DISCUSS

The second step in the RDR process is to **discuss** the Issue. By clarifying it during the Raise step of RDR, we've reduced the likelihood of rambling and tangents, however well-intentioned. Instead, quality discussion centers on identifying a solution.

It's important to remember that collaborative, solution-focused discussion is an organizational skill that may feel unnatural at first but can be mastered with repetition and intent. To that end, it can be helpful to review key principles of discussion.

- The Facilitator and team should make an effort to ensure everyone participating in the discussion is heard. That said, every person does not need to weigh in on every Issue. It's vital to hear from those closest to the facts.
- Speakers should be brief. Team members should focus their comments on what matters most about the Issue and, ideally, only say what they say once. RDR time is not an open mic.
- Everyone should appreciate that each individual has their own way of processing an Issue. Some may be analytical, while others may feel their way through. Effectively shared, all can be useful.

RESOLVE

The third step in the RDR process is to **resolve** the Issue. Since it has already been raised and discussed, finding the solution is often straightforward. If it simply called for information or communication, the Issue may already have been resolved.

If follow-up is needed, the team expresses the solution as a To-Do, or if it's a big Issue, we move it to the Long-Term Issues list as a Rock candidate for this or some future quarter.

The RDR process concludes with the Issue's owner declaring the Issue resolved.

Segment 9: Next Steps

It's the homestretch. In Segment 9, which is relatively short, the Facilitator reviews all the new [To-Dos](#) that have been created during the QPM, checking that each responsible party is aware and needs no further clarification. If we haven't already done so, we always give everyone who owns a Rock a To-Do to "Make my Rocks SMART." This recap reinforces team alignment and helps ensure that everyone can hit the ground running.

HOW IT WORKS

Over the course of a productive QPM, it's common to create many To-Dos. In Segment 9, the Facilitator presents the full list and, starting from the top, notes each one. As they do, the Facilitator solicits an acknowledgement from the team member responsible.

Typically, the responsible team member verbally affirms that the To-Do belongs to them and indicates they don't need clarification. They're good to go. If a team member does have a question related to their To-Do, the Facilitator leads a clarifying discussion.

It's common to create many To-Dos over the course of a QPM.

Segment 10: Conclude

In Segment 10, each team member shares their major takeaways – the things that made the biggest impression during the QPM – and the degree to which their expectations for the meeting were met. To focus this brief reflective process, the Facilitator also asks each person to grade the quality of the meeting on a scale of 1 to 10, with 10 being a great meeting.

HOW IT WORKS

Just as many meetings don't start effectively, many do not end well, either (and some seem to never end at all). One hallmark of a well-run QPM is that the meeting concludes clearly, with constructive reflection and a sense of closure.

To make that happen, the Facilitator prompts each team member to finish by sharing three things:

1. **Takeaways** – Which items made the biggest impressions? Did the team member have any significant realizations?
2. **Expectations** – To what extent did the meeting meet their expectations? What made it so?
3. **Rating** – What grade do they give the QPM, on a scale of 1 to 10? Why?

What or who made the biggest impression during the QPM? Did the QPM meet expectations? How so?

Modifying the QPM Agenda

Some organizations modify their QPM agenda to better suit their needs. They may add new segments or customize those that exist. At Ninety, while we think our QPM agenda works exceedingly well, we encourage ([and our platform supports](#)) this type of initiative. The goal is simply to identify and do what works best for you and your colleagues.

POSSIBLE MODIFICATIONS

There are countless possible modifications to the QPM agenda. Here are three we've seen others find useful:

1. **Enhanced Check-In** — Some teams, especially those that work from anywhere, benefit from a deeper check-in, one that invests more time in exploring where everyone is and gives them space to reconnect as they settle into the meeting.
2. **New Tool Check** — For teams that have recently implemented a new CTD, it may be beneficial to dedicate time to checking on the experience so far. Doing so can help identify potential issues and ensure the CTD is well-applied.
3. **Team Health Training** — Certain teams benefit from extra time focused on developing [organizational culture](#) and health. If so, the Facilitator can leverage their experience and contextual knowledge to choose the most effective team-building exercise.



Modifications to the QPM agenda can tailor the experience to each team and organization.

Depending on its size, an organization may have multiple teams, each overseeing a different department. There may be a Senior Leadership Team (SLT) and several Departmental Leadership Teams (DLTs). In that instance, it's critical for all Planning Meetings (PMs) to be synchronized, whether Annual or Quarterly.

HOW IT WORKS

If a Senior Leadership Team sets Numerical Goals and Rocks that contradict those of its Departmental Leadership Teams, the entire organization can falter. The simple solution is to schedule and split the DLT PMs, as needed. Here's how we do it:

First, we schedule the SLT PM to occur approximately every 90 days. The dates are set well in advance so that everyone in the organization is aware, especially the DLTs, since their PMs need to occur in concert.

The DLTs then schedule their PMs in two parts. Part 1 occurs before the SLT PM, and Part 2 occurs after the SLT PM.

- **DLT PM Part 1** — In Part 1 of its PM, a DLT reviews their previous quarter's Numerical Goals and Rocks. Based on what was accomplished, they establish proposed Numerical Goals and Rocks for the next quarter. They also identify any Issues that warrant cascading up to the SLT. All this information will be reviewed at the SLT PM.
- **SLT PM** — At the SLT PM, the team reviews every DLT's proposed Numerical Goals and Rocks, as well as any Issues. Doing so allows the SLT to see how the entire company performed, along with any Issues that may impact the company's progress toward its 1-Year Goals. The SLT then sets the company's Numerical Goals and Rocks.
- **DLT PM Part 2** — In Part 2 of its PM, the DLT reviews the company's updated Numerical Goals and Rocks, any feedback from the SLT on the DLT's Numerical Goals and Rocks, and any solutions the SLT created for the Issues that were cascaded up. Then, the DLT sets their final departmental Numerical Goals and Rocks.

Takeaway

Around the 90-day mark, even focused, cohesive teams can begin to diverge. Planning Meetings (whether Annual or Quarterly) provide a timely opportunity to set goals, assess progress, and adjust strategies. In short, it's a time to reconnect and calibrate, with the end goal of working *on* the business rather than merely *in* the business.



Key Terms

- **9 Core Competencies** – The fundamental aspects an organization must master as it seeks to grow and develop: Vision, Planning, Customer, People, Structure, Data, Meetings, Process, and Exit.
- **Facilitator** – A person familiar with the QPM process, pre-selected to guide the team through the agenda. The Facilitator can be a team member or third-party participant, like a coach or partner.
- **Focus Filters** – A collection of essential agreements that represent the company's Vision, Values, and Goals.
- **Issues** – The biggest, highest-impact items or topics facing the company. These can range from organizational challenges to ideas and new opportunities.
- **Numerical Goals** – These quantitative 90-Day Goals include financial and KPI-based numbers that define what a strong quarter looks like.
- **Quarterly Planning Meeting (QPM)** – A meeting that occurs once per quarter, usually over the course of a full or half day, with the intent of team goal-setting, progress assessment, and strategy adjustments.
- **Raise, Discuss, and Resolve (RDR)** – An efficient and effective process to state, then resolve, issues through collaborative, solution-focused discussion.
- **Rocks** – These qualitative 90-Day Goals represent the organizational priorities that should be accomplished by the end of the next quarter.



WHAT'S NEXT?

Thank you for taking the time to explore this guide. Now that you have a sense of how these concepts and their related tools advance a company's Vision, you may be eager to implement them in your own organization. We're here to help! Find more company-building information in the [90u Library](#) or [try Ninety today](#).