PREP. RUN. CASCADE.

Your Complete EOS® Annual Planning Checklist

A well-executed annual planning process is crucial for running on EOS, yet it can be challenging to coordinate. Work through each phase, assign an owner, and set a due date so nothing slips before, during, or after the session.

BEFORE
Phases 1–2: Facilitator and team prep

DURING
Phase 3: Run the two-day session

AFTER
Phases 4–5: Cascade to the company

1 Facilitator prep work

	OWNER	DUE
☐ Grade Q4 on Numerical Goals (financial and major measurables) and Rock performance		
☐ Review definitions of Core Values, Core Focus™, and Target Market		
☐ Grade year on Numerical and Annual Goals performance		
☐ Review the Org Assessment		
☐ Agree on new 3-Year Picture™ and 1-Year Plan		
☐ Identify a Scribe and Facilitator for each session		
☐ Update Scorecards and Financials		
☐ Send the Org Assessment		
☐ Plan a Team Health Exercise		

FACILITATOR NOTES

2 Team member prep work

	OWNER	DUE
☐ Draft Rock candidates and add them to Long-Term Issues or the Planning Board		
☐ Reflect on the year: what worked, what you learned, and how you adjusted		
☐ Think ahead: where are we headed 10 years, 3 years, and 1 year from now?		
☐ Take the Org Assessment		
☐ Review the Issues List and add anything to discuss		
☐ Update the status of Rocks from last quarter		
☐ Departments update or set 2-Year Goals, 1-Year Plans, and Rocks		
☐ Departments solve key issues needed to make progress into the next quarter		
☐ Make all Rocks SMART: Specific, Measurable, Achievable, Relevant, and Time-bound		
☐ Schedule department Annual Planning sessions		
☐ Review Headlines from leadership Annual Planning		
☐ Departments grade the year and the quarter		

PREP NOTES

3 Run the meeting: gain SLT alignment on the year ahead

- [ ] IDS® the issues that need to be addressed for the quarter and year ahead
- [ ] Lock in schedules, logistics, and the plan to cascade decisions
- [ ] Do a Team Health Exercise
- [ ] Update your SWOT
- [ ] Create Rocks for next quarter

4 Post meeting: whole company alignment

- [ ] Review the Org Assessment
- [ ] Add Key Component scores to the Quarterly Scorecard
- [ ] Create Long-Term Issues for opportunities to strengthen all Six Key Components™

5 Hold State of the Company

- [ ] Book the date and time
- [ ] Prepare the deck

SESSION NOTES

Keep your plan alive all year in Ninety

Rocks, Scorecards, Issues, and your V/TO® in one place.

NINETY.IO/ANNUAL-PLANNING

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TWO-DAY MEETING AGENDA

Your 2-Day EOS® Annual Planning Agenda

A compelling Vision doesn't live in a drawer. It must be reviewed, refined, and shared by all. Over two days, your leadership team revisits the V/TO®, resets the 3-Year Picture™ and 1-Year Plan, and aligns around the priorities that matter most.

DAY 1 7h 55m

Build trust and update the Vision

Increase team health and trust, update the company Vision, and surface all material issues.

DAY 2 7h 35m

Set the plan and solve the issues

Get 100% aligned on Vision, set 1-Year Goals and Rocks, and solve all key issues.

AT A GLANCE

Objectives	5 min	Objectives	5 min
Check-in	30 min	Check-in	15 min
Review prior year	15 min	Review issues and 3-Year Picture	15 min
Review prior quarter	15 min	1-Year Plan	120 min
Team health	165 min	Rocks	120 min
Org Assessment	60 min	Tackling key issues	165 min
SWOT	60 min	Next steps	7 min
V/TO®	60 min	Conclude	8 min
3-Year Picture™	60 min		
Conclude	5 min		

SESSION LOGISTICS

DATES

LOCATION

FACILITATOR

SCRIBE

DAY 1

Build trust and update the Vision

7h 55m
Total time

START	SESSION	WHAT HAPPENS
0:00	**Objectives** 5 min	Set goals and expectations for the two days: increase team health and trust, update the company Vision, and resolve all material issues.
0:05	**Check-in** 30 min	Share three business bests, one unexpected business best (optional), and one personal best. Share your expectations for the two days.
0:35	**Review prior year** 15 min	Review 1-Year Goals: revenue, profit, KPIs, and targets. Rate the year.
0:50	**Review prior quarter** 15 min	Review the prior quarter and rate it.
1:05	**Team health** 165 min	Strengthen trust, vulnerability, and communication on the leadership team with a Team Health Exercise.
3:50	**Org Assessment** 60 min	Review the Org Assessment, add Key Component scores to the Quarterly Scorecard, and create Long-Term Issues to strengthen all Six Key Components™.
4:50	**SWOT** 60 min	Identify the internal and external factors that will help or hinder your goals. Complete a yearly competitive analysis.
5:50	**V/TO®** 60 min	Reaffirm Core Values, Core Focus™, 10-Year Target™, and Marketing Strategy.
6:50	**3-Year Picture™** 60 min	Set a vivid, measurable three-year vision for success.
7:50	**Conclude** 5 min	Ask for outstanding questions, thank everyone, and set expectations for Day 2.

DAY 1 NOTES

DAY 2

Set the plan and solve the issues

7h 35m
Total time

START	SESSION	WHAT HAPPENS
0:00	**Objectives** **5 min**	Reset and refocus: get 100% aligned on Vision, set 1-Year Goals and Rocks, and solve all key issues.
0:05	**Check-in** **15 min**	Look back at Day 1: a highlight, where your head is, and your expectations for Day 2.
0:20	**Review issues and 3-Year Picture** **15 min**	Review both to make sure everyone is on the same page.
0:35	**1-Year Plan** **120 min**	Prioritize what needs to happen over the next 12 months. Each step should move you closer to your 3-Year Picture.
2:35	**Rocks** **120 min**	Identify the most important priorities for the next 90 days, focusing on Rocks that drive your 1-Year Goals.
4:35	**Tackling key issues** **165 min**	Solve the biggest issues standing in the way of the plan using the normal IDS® process.
7:20	**Next steps** **7 min**	Review all To-Dos and plan how you'll cascade decisions to the rest of the organization.
7:27	**Conclude** **8 min**	How are you feeling? Were your expectations met? How would you rate this session?

DAY 2 NOTES

Run your entire session in Ninety

Agendas, timers, Rocks, and issues, all in one place.

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