Annual Strategy Template — includes all the slides you need to communicate your strategy and focus to your organization and teams.

Developed by Ritmoo, goal management platform for startup and scaleups gain clarity.

Let’s avoid a gigantic set of slides and keep things simple to what a company and/or a team really need to communicate a clear strategy and priorities.

In this deck, you will find a split between a section for the company, for the team, and for yourself.

Company slides

- Purpose & strategy
- Problem to solve & Ideal Customer Profile (ICP)
- The Competition
- Guiding principles
- Company KPIs
- Company Goal(s)
- Milestone Timeline
- Behaviours and Rhythm
- Non-Negotiables

Team slides

- Team Purpose
- Team Narrative(s), Commitment(s) and Key Tasks
- Team Behavior and Rhythm

About the Deck

- Goal Setting Mindset
- NCT Framework
- About Ritmoo

Company Slides

Our purpose-statement

Consider this a purpose statement or your mission statement, if you have one. Start with the big goal of the company, the inspirational part.

Example for a web design platform.

Empowering creators everywhere.

Our purpose is to empower anyone, anywhere to bring their ideas to life through simple, intuitive design tools—
because creativity should be accessible to everyone,
regardless of their skills or resources.

Our strategy-statement

Consider this a strategy statement that is focused on the shift required for the upcoming year, 3-year, depending on your context. Focus on the moving dynamics and the end outcome expected out of it.

Example for a CRM platform.

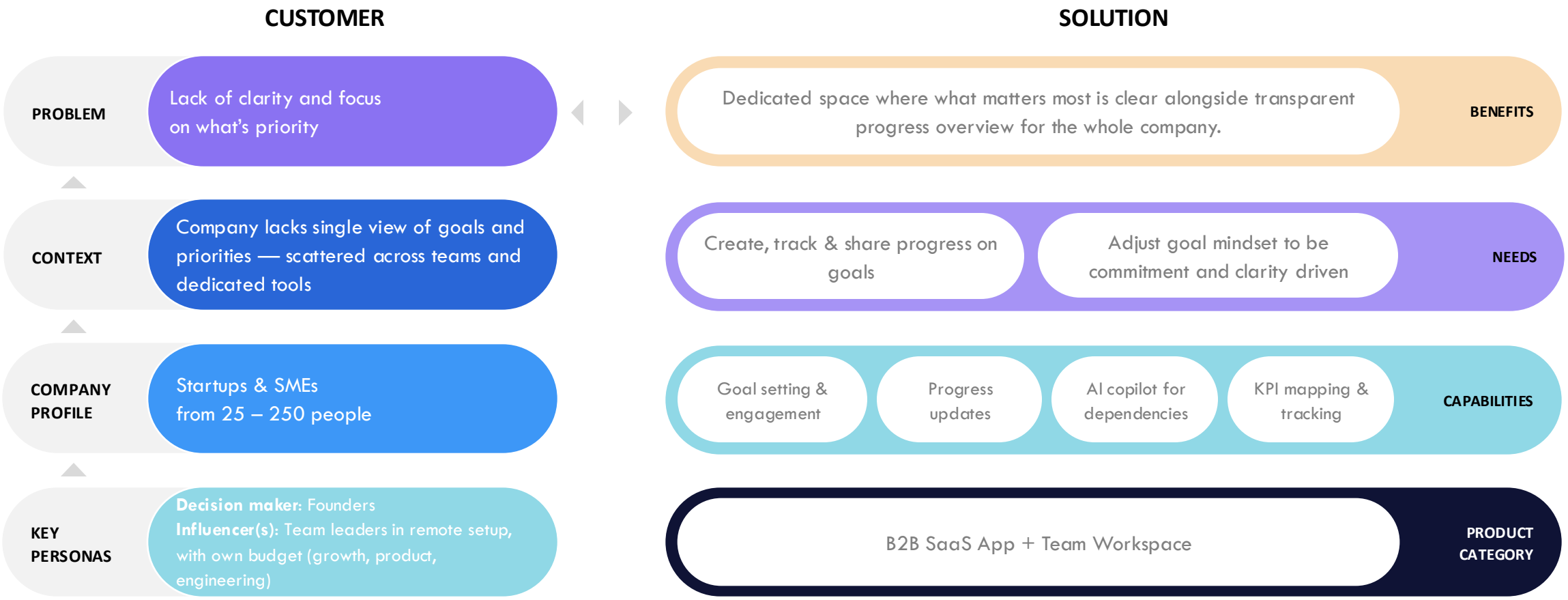
Shift from sales tracking to complete business management.

Expand from sales tracking to a full business platform by first adding customer service, then marketing tools. Leverage partners, creative content, and seamless product integration for easy onboarding. Target the existing customer base to cross-sell, driving adoption across departments. The end outcome is increased ARR through broader usage and cross-sell opportunities.

PROBLEM TO SOLVE & ICP

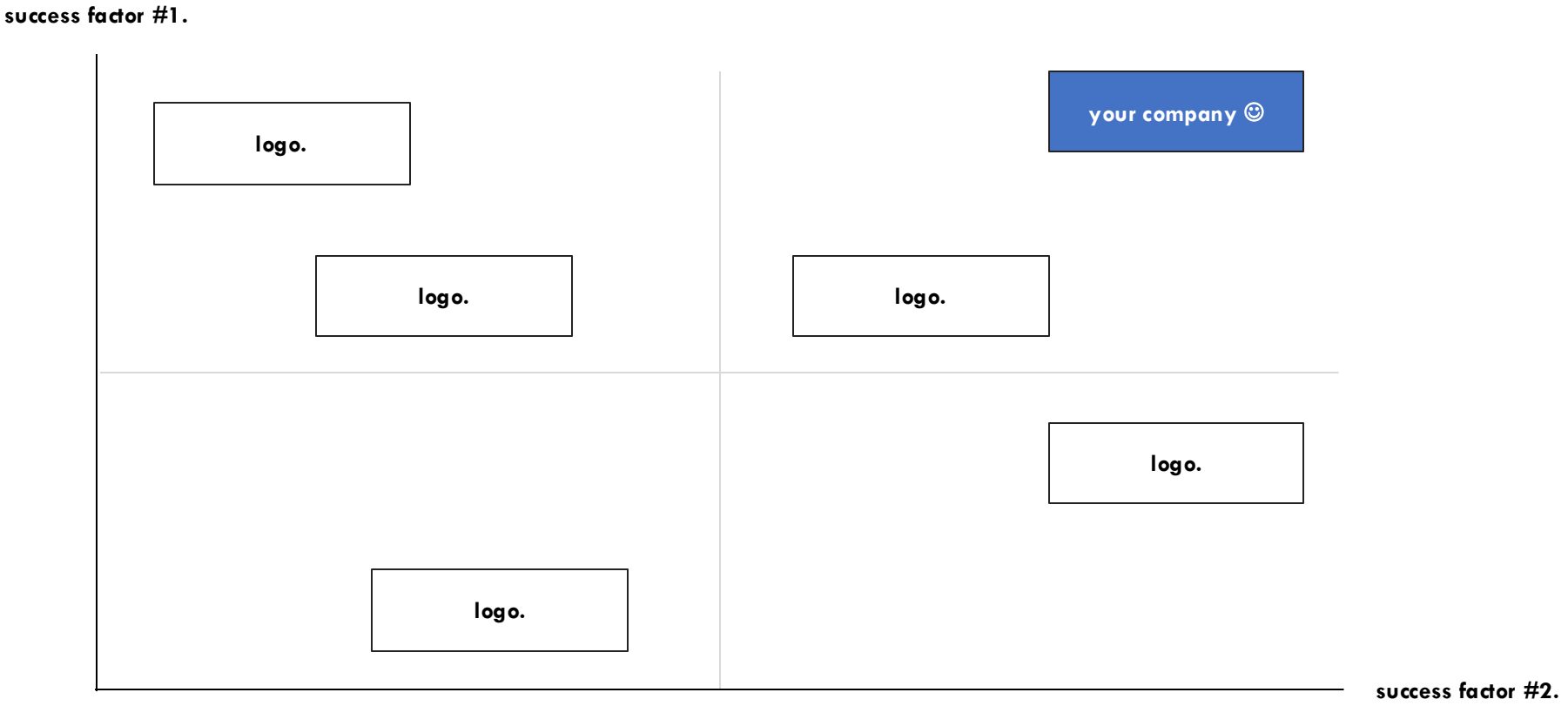
Our focus is on the category of goal management, towards founders a
[example for a goal management platform]

This is an overview to help the company understand the problem being solved, the context being faced, the company profile and the persona (influencers and decision makers) and the benefits / solution from the company, in a single view



Put here the one-statement the explain the positioning of your compa against others. Explain the rational behind.

💡 The choice of axes say more than you being top right. what are the key success factors to win?



Guiding principles

Create your own guiding principles — perhaps 3 to 6, up to you.

Guiding principles are long-term, foundational statements that direct how an organization approaches its market, customers, and internal culture, ensuring consistent decision-making and strategic alignment. *Example below for a sports shoe company.*

1. Relentlessly prioritize athlete success.
2. Champion diversity and inclusivity in every design.
3. Inspire a competitive spirit across our culture.
4. Innovate through sustainable performance.
5. Win through digital integration.
6. Empower communities through purposeful partnerships.

GOALS & PRIORITIES

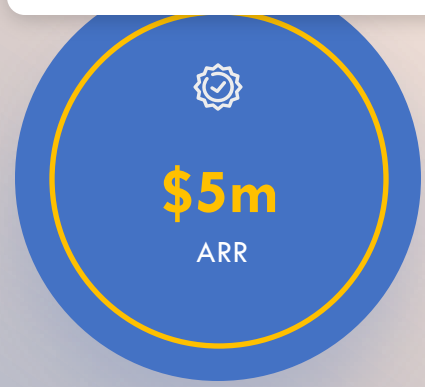
Company KPI(s) & North-Star Metric

This is an example of the KPIs and/or North Star Metric. The idea is to highlight the main KPI and metrics that matter most for the business, perhaps even highlight the shift and growth compared to the current year.

Explaining the rationale (e.g. B2B Intranet)

To reach our goals of 15,000 weekly active users (WAU), $5M ARR, and a 4.9 G2 rating, our key KPIs will focus on engagement, revenue growth, and customer satisfaction.

WAU is our North Star Metric, reflecting user adoption and value. We'll track customer retention to ensure strong renewals and focus on expansion rate for upsells and cross-sells that drive ARR.



Company Goal(s)

This is an example of the goals for a company. They might not say much, but it's the next slides as example that provide the real context. Keep it limited to 3 ideally.

Product Delight & Mobile App

Product | Engineering

Thought Leadership Campaigns

Growth | Marketing

Market Capture & Expansion

Sales | GTM | CS | Finance

Fit–For-Purpose Processes

IT | RevOps | RevOps | HR

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GOAL — PRODUCT DELIGHT & MOBILE APP

“ Narrative

Our B2B intranet is expanding with **new mobile capabilities** and **collaborative features** to support today’s hybrid workforce. With 60% of employees working remotely and mobile platforms driving 30% higher engagement, we are introducing **real-time document collaboration, AI task management,** and **offline access** via our mobile app.

These features will help teams collaborate faster, manage tasks efficiently, and stay productive. This expansion transforms our platform into a central hub for daily operations, driving higher adoption.

What is a Narrative? A 2-3 sentence description of what the team wants to achieve in a time period (e.g. a quarter). For the company could be a narrative for the annual achievement goal. **Copy paste the slide and do the same for each Goal.**

Product

Engineering

Critical Initiatives

Critical Initiatives or Key Initiatives are the main projects that the company needs to prioritize to achieve its goals — these are the needle-moving actions as business leaders like to call it. **Limit it to 6 at most.**

01

Mobile App Launch

Ensure mobile access to all key intranet functionalities (collaboration, messaging, task management) by Q2.

Why It's Critical: Mobile is key for increasing engagement, with remote and hybrid workers relying on seamless access.

02

Experimentation & Collaboration Mindset

Foster a company-wide culture focused on innovation, fast learning, and cross-team collaboration.

Why It's Critical: Drive quicker problem-solving, and higher employee engagement, which directly impacts user experience and product success.

03

Partner with Industry Leaders for Integrations

Integrate with popular third-party business tools (e.g., Salesforce, Slack) to enhance user experience and streamline onboarding.

Why It's Critical: Easy integration reduces friction, speeds up adoption, and increases the value of our platform in daily workflows, contributing to WAU.

04

Thought Leadership for Demand Generation

Develop a thought leadership initiative through SEO-driven content, webinars, and a new show to showcase expertise.

Why It's Critical: Thought leadership builds credibility and positions the company as a market leader, generating demand and new leads that will drive ARR growth.

05

Cross-Sell to Existing Customers

Roll out targeted marketing to current desktop users, promoting mobile and new features like AI-powered task management.

Why It's Critical: Cross-sell efforts will help drive adoption and maximize revenue from the existing customer base, supporting ARR growth.

06

Develop Data-Driven Customer Success Program

Use user engagement data to proactively support customers, reduce churn, and drive upsells through personalized outreach.

Why It's Critical: Customer success is critical for retention and expansion, ensuring that existing customers see ongoing value, contributing to retention.

Critical Initiatives *[DIFFERENT APPROACH]*

Critical Initiatives or Key Initiatives are the main projects that the company needs to prioritize to achieve its goals — this template is from a different approach to also highlight the non-critical initiatives.

NOW (H1)

- Mobile App Launch
- Thought Leadership Campaign
- Customer Success Program
- Launch New Pricing Plans

NEXT (H2)

- Cross-Sell Campaign
- Onboarding New CRM
- New Company Values
- Launch New Website

NEVER

- Build Custom Solutions
- Full Offline-Only Functionality
- New Product Category prior to 10m ARR

Milestone(s) timeline

Milestone timeline serves to showcase the main expected highlights of the year for the organization. **Keep it quarter-based for the company overview and detail it more per team later on.**

Q1

- Podcast Launch
- Customer Success Program Initiation
- Revised Onboarding Flow

Q2

- Mobile-App Launch
- Company Offsite #1
- New website launch

Q3

- AI-powered task management
- Cross-Sell Campaign Launch
- Roll-out new CRM
- New pricing plans

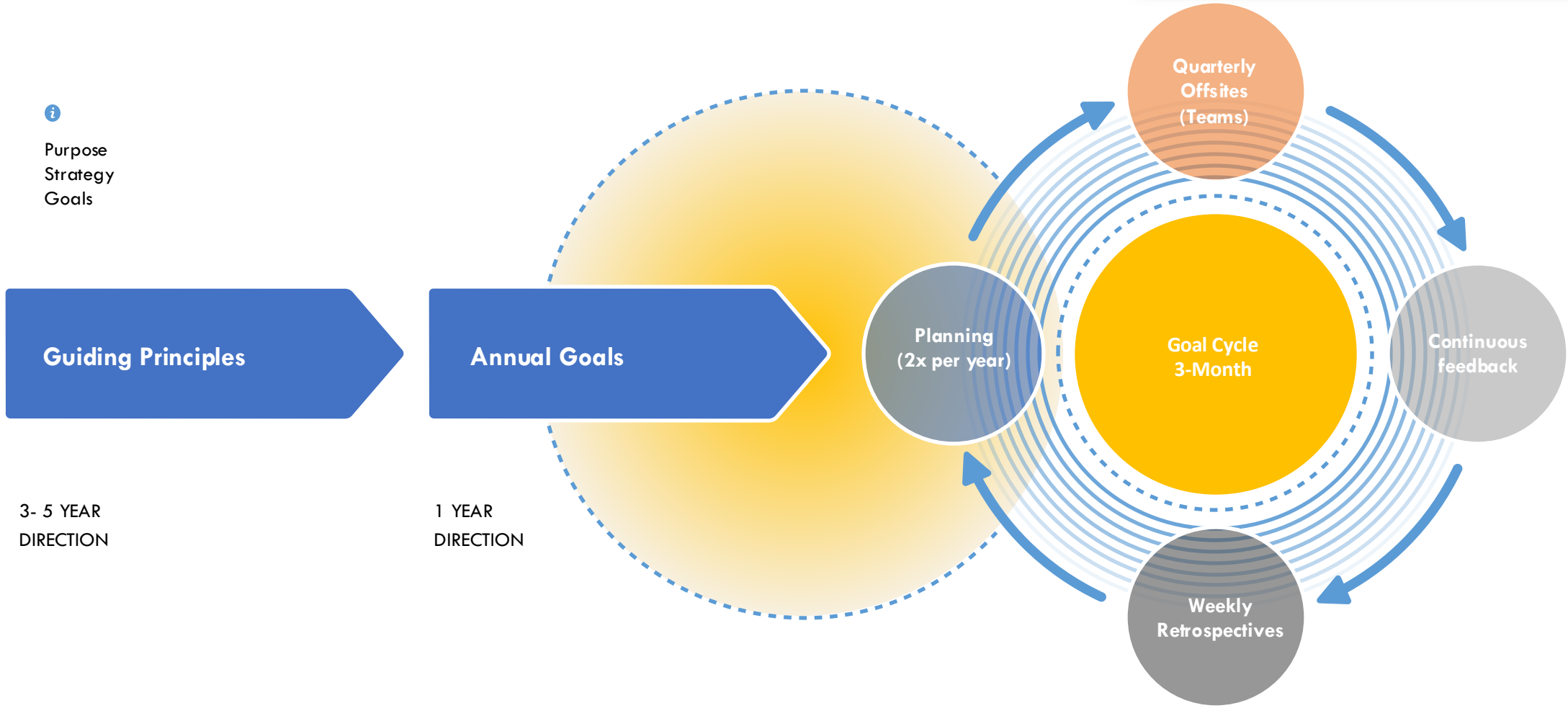
Q4

- Company Offsite #2
- New EU Tech in Lisbon

Setting the right cadence for the organization, with transparent overv

Adjust to your own context and reality. Here the important part is to explain the cycle to your organization.

Purpose
Strategy
Goals



3- 5 YEAR DIRECTION

1 YEAR DIRECTION

Non-negotiables (Example for the B2B intranet)

Your non-negotiables are the things that are important to your business; the things you expect from the company and the people in it. Limit it to 5 at most.

1. Users always come first.

Every feature must solve a real user problem. Prioritizing user needs ensures adoption and long-term success. If it doesn't help the user, it doesn't ship.

2. Mobile First, Not an Afterthought

Teams work on the move. Everything must work seamlessly on mobile to keep users engaged and productive, anytime, anywhere.

3. Collaboration is the Default

Users rely on us to work together. Every tool must make team collaboration easier, faster, and more intuitive, whether in the office or remote.

4. Data or It Didn't Happen

Decisions must be driven by data, not assumptions. We track user engagement and feature performance to continuously improve.

5. Simplicity Wins

Complexity kills productivity. If a feature isn't simple and intuitive, it won't deliver value. Our goal is to remove friction in every workflow.

Company values & behaviors

Help organizations categorize their actions into Aspirational, Leverage, Manage, and Eliminate behaviors. This can be applied to any organizational or team context, showing where they need to evolve, focus, or cut back based on impact and whether the behavior is new or established.

A creative outlook at company values and behaviours that explain what needs to happen for the company to achieve its goals. This is more of a shift mindset based on the philosophy of "What got us here won't get us there". This is a great way to also engage and get collective intelligence from your company in a collaborative setup.

Aspirational

Growth Mindset

Action: Introduce continuous learning initiative with regular workshops and company-keynotes.

Leverage

Peer-to-Peer Recognition

Action: Expand recognition program with monthly awards.

Manage

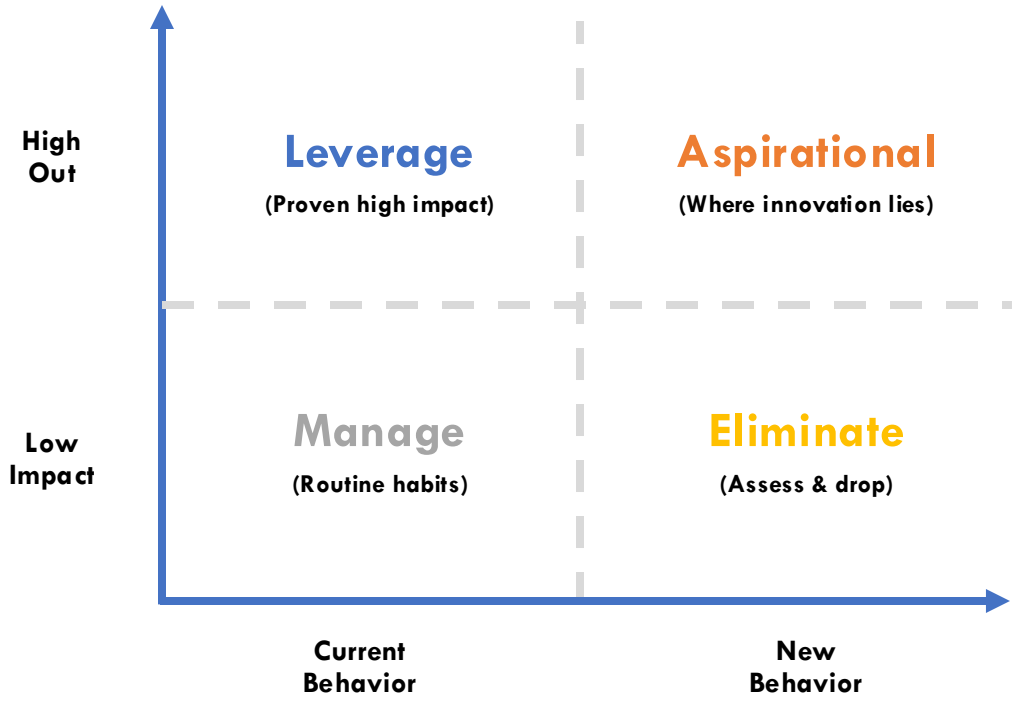
Routine-Reporting

Action: Q&A Automate reports and limit meetings to bi-weekly check-ins.

Eliminate

Meeting-dependency

Action: Introducing a meeting-free day (Wednesday).



Team Slides

TEAM PURPOSE

Our team purpose-statement

Consider this a purpose statement or your mission statement, specifically focused on the team. Start with the big goal of the company, the inspirational part.

Example for a Marketing team at a web design platform.

Building connections, together.

"Our team empowers a vibrant community through creative and thoughtful campaigns, working together with a spirit of collaboration to help users feel inspired and connected to our platform."

Q1 2025 Team Goals *[example B2B intranet SaaS]*

This is an example of the Goals (summary) for the team, for a specific quarter or another time period. You can adjust accordingly, based on your context. You can choose to highlight specific teams or channels in front of the goal.

Amplify Demand Generation

Growth | Digital | Paid

Refine Messaging

Brand | Content

Strengthen Customer Engagement

Content | CS

Q1 2025 Team Goals *[example B2B intranet SaaS]*

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“ Narrative

We aim to increase pipeline by 20% in Q1 by focusing on paid media and content marketing.

Organic traffic grew 15% in Q4, but paid channels underperformed. To address this, we will launch a targeted paid media campaign and develop a content hub with resources for our target audience (HR Leads, IT Managers).

By expanding our reach and engaging new leads, we will drive higher conversions and support ARR growth.

What is a Narrative? A 2-3 sentence description of what the team wants to achieve in a time period (e.g. a quarter). For the company could be a narrative for the annual achievement goal. **Copy paste the slide and do the same for each Goal.**

Growth | Digital | Paid

Commitments

1. Generate $3m in pipeline through ABM campaign
2. Develop and launch a content hub focused on educational resources
3. Optimize SEO to increase organic traffic by 15%
4. Implement a webinar series with industry experts to drive leads and launch first 3 sessions
5. [INSERT IF NEEDED]

What is a Commitment?
Commitments are **3-5 objectively measurable goals** that the team is committing to achieve by the end of the time period set (e.g. quarter). Commitments are the evidence that the team has made progress on the Narrative.

"Commitment" immediately shifts people out of the aspirational and wishful thinking around goals and focuses them on what is practical & achievable. **People take their commitments seriously.**

Tasks

1

Generate $3m in pipeline through ABM campaign

1. Identify top 50 high-value target accounts and align with sales teams.
2. Develop personalized outreach content for each account, including tailored case studies and feature demos.
3. Launch an ABM email sequence and display ads targeting decision-makers within those accounts.
4. Set weekly cadence with sales teams for sharing feedback, structurally.
5. Schedule account follow-ups and nurture any unconverted leads with targeted webinars and eBooks.

What are Tasks?
Tasks are important because they provide clarity and help determine if a goal is actionable and achievable.

Importantly, Tasks are not the end goal. At the end of a quarter, if you've achieve all of your Commitments, but not completed any of your Tasks — that's a win. On the other hand, completing Tasks but missing Commitments means the team fell short.

Don't spend too much time on the Task list. The Tasks are a starting point and don't need to be exhaustive.

Team values & behaviors

A creative outlook at company values and behaviours that explain what needs to happen for the company to achieve its goals. This is more of a shift mindset based on the philosophy of "What got us here won't get us there". This is a great way to also engage and get collective intelligence from your company in a collaborative setup.

Help teams (alongside organizations) categorize their actions into Aspirational, Leverage, Manage, and Eliminate behaviors. This can be applied to any organizational or team context, showing where they need to evolve, focus, or cut back based on impact and whether the behavior is new or established.

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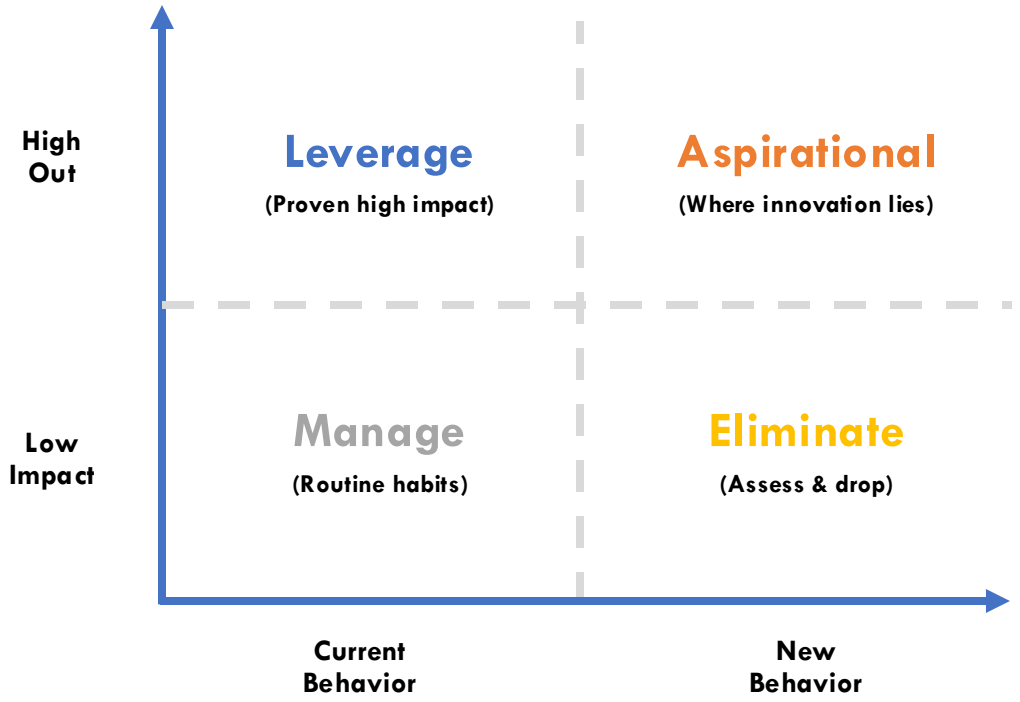


The way we work & collaborate [e.g. Marketing team]

This slide is for inspiration on making it clear to the team how it will work together. It's way to make sure accountability exists and everyone knows what the intent of each meeting and setup.

Touchpoint	Approach	Frequency	Topics	Participants
Marketing Meeting	Sync	Weekly, each Monday	Performance Check-In, Priorities, Calendar Check, Dependencies	Entire Team
Retrospective	Async	Weekly, each Friday	Review of the week, dedicated channel	Entire Team
Sprint Planning	Sync	Bi-Weekly	Task Allocation, Prioritization	Growth Team
Sprint Demo	Sync	Bi-Weekly	Team Demonstrations	Growth Team
Monthly Reporting	Async	Monthly	Performance Review, Insights, Learnings	Team Leaders
Quarterly Offsite	Sync	Quarterly	Performance, Culture, Learnings, Insights	Entire Team
Quarterly Reflection	Async	Quarterly	Reflection, Celebration, Learnings	Individually
…	…	…	…	…

About this deck

Goal setting approach — breaking the vicious cycle.

Strategy and roadmapping are challenging, but where teams often stumble is execution. Most know their long-term vision but struggle to turn it into reality.

Every quarter, the same pattern emerges:

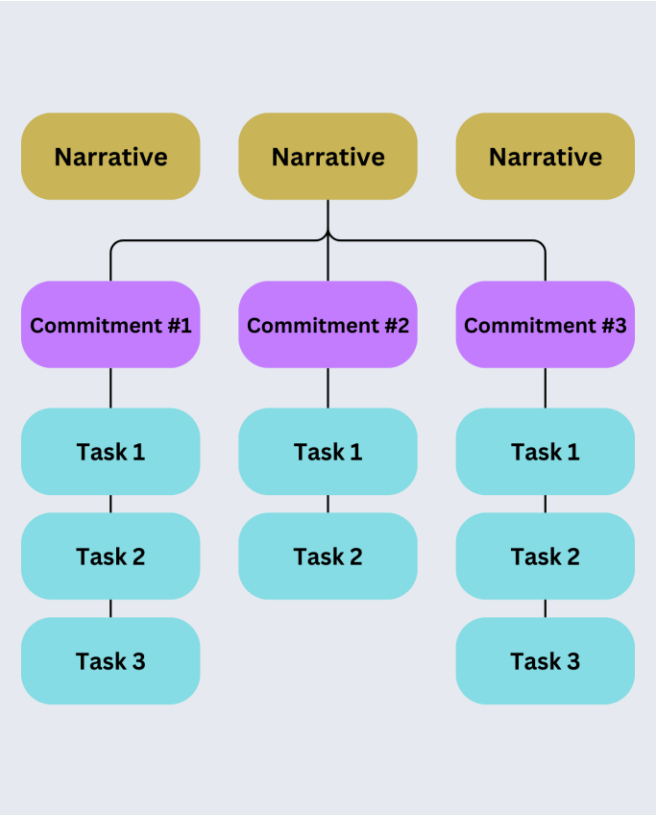
1. Lofty goals are set to impress, but the actionable steps to achieve them are missing.
2. When those goals aren't met, confidence takes a hit, and leadership applies more pressure, leading to even more unrealistic targets.
3. This creates a cycle of over-promising and under-delivering.

The truth is, goal setting is a skill that takes practice.

It's about striking the right balance between strategy and execution.

Teams need clarity on what they're trying to achieve, a plan that's inspiring and yet doable, a supportive environment to stay committed, and the flexibility to adapt without losing momentum.

Meet the NCT Goal Framework, Introduced by Ravi Mehta, NCT emphasizes the 'why' behind goals, providing context and purpose, which fosters greater commitment and alignment across teams.



Narrative

The narrative is a 2-3 sentence qualitative description that provides context to the goals. It explains why certain goals are essential and how they align with the broader business objectives.

Commitments

3-5 specific, measurable goals that teams aim to accomplish within a set timeframe. Unlike traditional key results, commitments in the NCT framework are designed to be directly actionable and are crucial in measuring the progress towards the narrative.

Tasks

These are the key actions or steps that need to be taken to fulfil the commitments. Tasks are the most granular level of the framework, though should be kept as key tasks, not every single little details.

Why not using OKRs, which is a more widely adopted method?

While acknowledging that OKRs have been instrumental in driving success for many companies since the 1970s, a lack of emphasis on embedding the 'why' and 'how' into their strategy potentially poses limitations that can risk negatively impacting team performance.

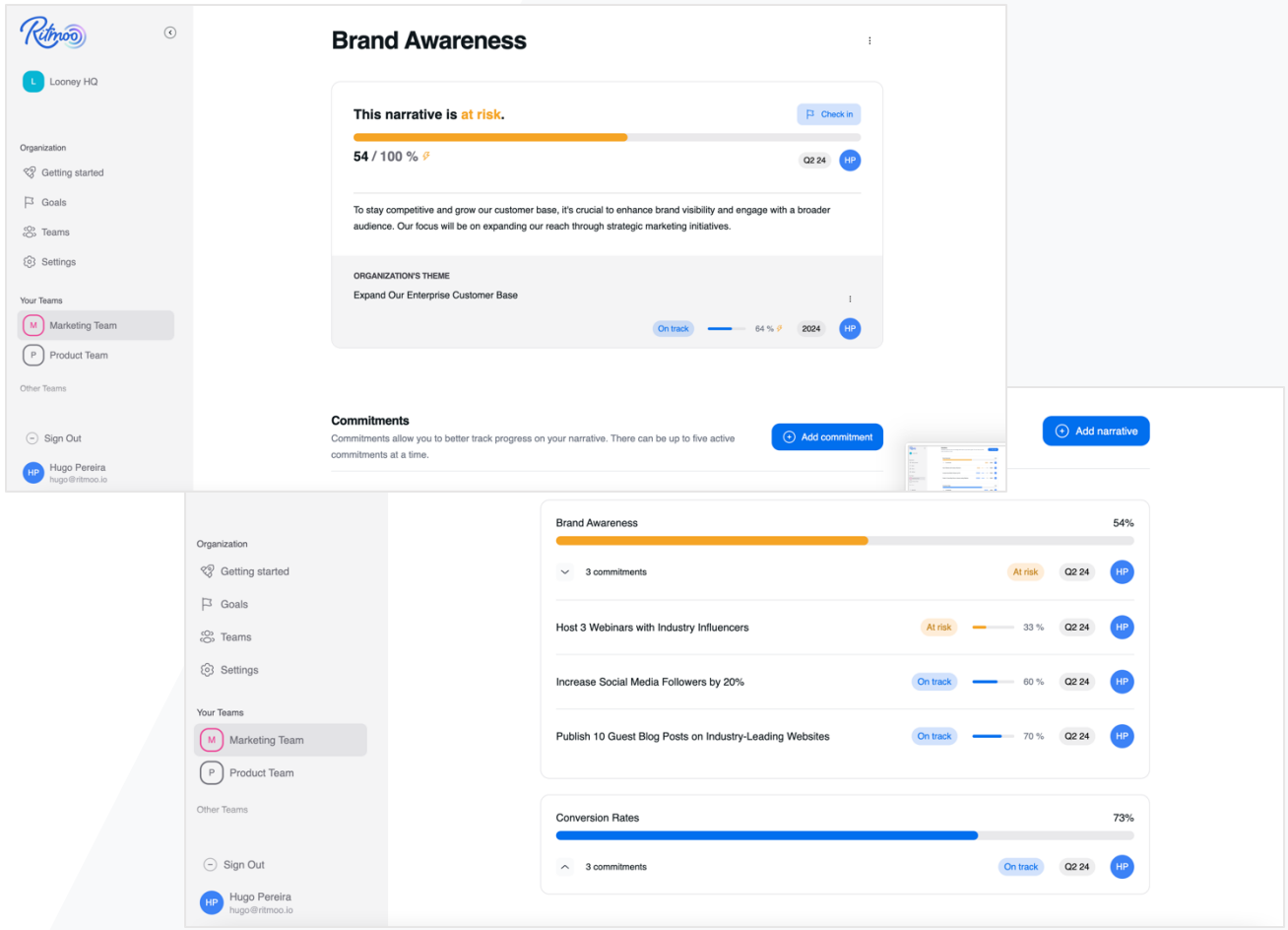
These 'pitfalls' include a lack of strategic depth, vagueness, over-reliance on stretch goals, difficulties in tracking cross-functional execution, a narrow focus on metrics rather than meaningful outcomes, insufficient flexibility in adapting to dynamic work environments, and inadequate guidance for execution.

- Not a clear enough distinction between Objectives and Key Results, leading to an unclear connection between strategy and near-term outcomes
- Overly ambitious Key Results for which the team does not have a feasible plan to achieve
- Key Results framed entirely in terms of metrics, not taking into account that other outputs and outcomes are important steps towards a goal

Ritmoo's mission is to help teams and leaders makes goals and direction clear for everyone.

We want teams and business to experience goal management as it should be:

- **straightforward**
- **impactful**
- **tailored for clarity**



A great story always starts with a great team (=duo)

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