FlexOps

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Quarterly planning meeting agenda for agency owners

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A quarterly planning meeting is 2 to 3 hours, once a quarter, where you look at the whole business. It answers 3 questions, which are how you've done over the last 90 days, what's worth discussing today, and what you should do over the next 90 days, and you leave with 3 to 5 priorities that each have an owner and a date.

Read this online at flexops.co/resources/quarterly-planning-meeting-agenda

When an agency needs this

The owner who needs this probably isn't giving the team a sense of clarity and direction. They feel like they're spinning their wheels a bit themselves, and they may not be seeing the team focus on what they'd consider the right things. The quarterly gives you a chance to decide with the team what the key things are, and I think of it as a reset each quarter on what the right things are for the next 90 days.

Your regular meetings are about momentum, so they're for making progress on the key things and making decisions. The quarterly steps back from all of that, and it's the session in the calendar where nothing is urgent and everything is important.

There are 2 reasons I run it with the owners I work with, and both come from watching the same thing happen across a lot of agencies.

The first is that objectives get set but don't get completed. It's 1 thing to decide what the key things are, and it's another to do them. A year passes, and the same key things are still on the list.

The second is that the important things come second to clients. Pricing, the person who isn't working out, the client that's 40% of revenue, whether the shape of the business is right. These are all things you say you'll talk about later, and in my experience you rarely do.

The agenda, with timings

It runs to roughly 2 to 2.5 hours. I'd make it shorter for a small team, and longer if there's a particularly tough decision on the table.

Part	Time	What happens
Quick recap	15 minutes	The numbers, and any feedback or observations worth sharing.
Last 90 days	15 minutes	Any discussion that's needed around the priorities and the work completed, or still to do.
Discussion	60 minutes	1 or 2 key things, agreed in advance, discussed properly and ideally decided on.
Next 90 days	30 to 45 minutes	3 to 5 priorities, chosen from a longer list of ideas and thoughts.
Wrap up	15 minutes	Read back the key decisions and priorities. It's the last chance for any questions or double checks.

Start with how the last quarter went

When I walk an owner through this, the first thing we do is ask how the last quarter went. The reason we ask is for what comes out of it. What did we learn from it? What did we do, and what didn't we do? What has changed in the business that might influence what we need to prioritise now?

What a key discussion looks like

The key thing can be anything. The point is that if you've defined it as important enough, you should talk about it and resolve it.

It might be pricing, for example. A good hour talking about a change to your pricing model and pricing structure, with the right people, will achieve a lot. It will get you to a point where you've concluded what you need to do next and what's going to change.

If you don't do it in that setting, that conversation is going to take various forms over the next couple of weeks or even months, and it might not get resolved or decided at all.

What to prepare beforehand

I'd have these ready for everyone to read 24 to 48 hours before the session, so that the time in the room isn't spent going through the last 90 days line by line.

- **Your agency scorecard.** Your key numbers, filled in for the last 3 months if you can. I think it's the best single view of how everything across the agency is going, and there's a version with benchmarks on the marketing agency KPIs page.
- **Client health.** The whole client list for the current month. The changes matter most, such as a high-value client becoming low value or at risk, or the other way round. The client health score page shows how I'd score it.
- **Team health.** Only if someone is running it. With fewer than 5 people, I'd treat this as a conversation and not a data review. The team performance matrix works well here.
- **Last quarter's priorities.** If it's your first time, whatever you set yourself in January will do.
- **1 or 2 suggestions from each attendee** for what the key discussion points should be.

What you leave with

By the end of the session you should have 4 things.

1. An overview of the agency's health, scored against the same measures every quarter.
2. A reflection on the last 90 days, with every priority marked as done, not done or parked.
3. 3 to 5 priorities for the next 90 days, each with an owner and a due date.
4. 1 or 2 key things properly thought through and discussed in detail, and not skimmed over.

Who should be there

For a small agency, that may be you alone, or you and 1 other person. If you have a leadership team of 5 or 6, I'd have all of them in the room.

What to do afterwards

I'd write it up within 2 working days, and cover 3 things.

- What was decided.
- Who owns what, and by when it will be completed.
- The things you discussed but deliberately didn't act on, which is very useful to have next quarter.

The priorities then become the spine of your regular meetings until the next quarterly, so that nothing on the list is forgotten about for 90 days.

Where owners get this wrong

It goes wrong when there's no prep and no follow-up, and I'd say both are critical for this type of session. The prep has to include reflections on the last quarter, and the follow-up has to include clarity on the actions and the timelines.

There are a few other things I'd watch for.

- **Turning it into a numbers review.** If the prep and the reading are done beforehand, you can spend the session on the discussion and the decisions.
- **Changing the measures each quarter.** The value builds up over time. The first run won't make much difference, but by the third the trends will show you things that nobody in the business could have seen.
- **Moving a target because you missed it.** I'd say that's the fastest way to make the whole exercise worth very little. If you miss one, write down why, and decide whether the target or the approach was wrong.
- **Priorities without an owner and a date.** Even a mission-critical priority is unlikely to get done without a name and a date attached to it.
- **Too many priorities.** I'd keep it to 3 to 5 and stay well away from 8 or 10. If everything is a priority then nothing is, and the list from 3 months ago is usually what gives it away.

Questions owners ask about this

How long should a quarterly planning meeting be?

I'd allow 2 to 3 hours. That's enough for a short recap, an hour of proper discussion on 1 or 2 things, and setting the next 90 days.

What should be on the agenda for a quarterly meeting?

5 parts: a quick recap of the numbers, a look back at the last 90 days, a discussion of 1 or 2 key things, the priorities for the next 90 days, and a wrap up where you read the decisions back.

How many priorities should we set for a quarter?

3 to 5, each with an owner and a date. If you set more than that, in my experience very few of them get finished.

Do I need a quarterly meeting if it's only me?

I think so. It's the 1 session where you step back from client work and look at the whole business, and that's still worth doing on your own or with 1 other person.

If you'd like a hand with it

This is a session I run with the agency owners I work with. If you'd like to talk through how it would work for you, drop me a note or, by all means, book a call. The Agency Health Check is also a quick way to see what might belong on the agenda for your first one.