

EOS-Style Team Retreat Agenda

Segue

- » Personal & Professional good news
- » What's working and not working in the business
- » Expectations for the day
- » How will you will determine that the meeting was successful?

Quarterly Recap

- » Review of previous quarter KPIs (measurables)
- » Significant achievements
- » Previous quarter rock review

Looking Forward

- » Reminder of firm vision, mission, and annual goals
- » Share proposed priorities for the quarter
- » Select 3-7 company rocks for upcoming quarter
- » Select 1-3 individual rocks for upcoming quarter

Meeting Close

- » Feedback on the meeting
- » Were expectations met?
- » Rate the meeting 1-10. If below an 8, what would have made it better?

Team Building

- » Depending on how much time you have, you may consider some sort of fun team-building activity (happy hour, bowling, movie, etc.)