

High-Level Team Planning Agenda

- 1 Mission** – Is the current Mission statement accurate and genuine? If not, modify it. You can also have each team member share how they support the mission.
- 2 Metrics** – Share critical results from the year (revenue, new AUM, new HHs, events, referrals, etc.).
- 3 Vision** – Share your vision for the firm – what the next 1, 3, 5 and 10 years look like. Use the Vision Plan Exercise from Digital Fortress for this.
- 4 Goals** – Build out SMAC-certified goals that define success and fulfillment for the upcoming year.
- 5 Other Initiatives** – Projects for the coming year that aren't necessarily goals.
- 6 Culture** – Talk about ways to take culture to the next level (communication, roles, career path, comp/benefits, leadership).
- 7 Follow-up** – Be clear on What, Who and By When for each project/goal/task to be completed.
- 8 Fun** – Have a nice dinner, yoga, see a show, etc., to spend some social time together if desired.