



REBOOT

A Guide for Annual Planning



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INTRODUCTION

You have a vision, now make a plan.

As a leader, your job is to have and hold the vision and make sure it's understood by everyone in the organization.

Clarity helps the team and functions within the organization know what they're aiming for all together. Enter: Annual planning.

Annual planning takes a little finesse but is fairly simple in concept. A well-executed annual planning session also sets the stage for accountability throughout the year.

What you specifically need for your organization will vary depending on the size of the team, stage of growth, and how much of the planning, interpersonal, and communication structure is already in place within your organization's culture.

In this guide, we've compiled some of our favorite resources on this topic, including a few ways to approach vision and planning sessions, and what to think about (and clarify) before you embark on planning for the future.





Well-executed annual planning sets the stage for year-long accountability.

BRING CLOSURE TO THE PAST

What your organization will need will vary depending on the size of the team, stage of growth, and how much of the planning, interpersonal, and communication structure is already in place within your organization's culture.

Consider doing a past-action, retro-type process on the previous year before embarking on the next year's planning. Endings have to come before new beginnings.

Properly looking over the past year, sussing out what went well, what you'd like to see more of, and what you'd like to carry forward, helps to bring closure to the past and begins the process of looking ahead. [\[READ MORE\]](#)

CHECK OUT THESE BOOKS

For a basic approach to vision and planning, check out [The Advantage](#) by Patrick Lencioni.

For a blueprint on building a growth company, some of our clients recommend [Scaling Up: How a Few Companies Make It...and Why the Rest Don't](#) by Verne Harnish.

CONSIDER HIRING A COACH

Coaching is an excellent resource and support in times of change and with the day to day of running a company. Our clients utilize our coaching services for all kinds of things and annual planning is no exception. We are here to help implement whatever annual planning and strategy process you decide to use, or help design one bespoke to your organizations needs.

How a coach supports you will depend on your needs and the needs of your organization so you can count on an individualized approach. [\[LEARN MORE ABOUT REBOOT COACHING HERE\]](#)

A Simple Way to Approach Vision & Planning



EMAIL THE VISION TO THE TEAM



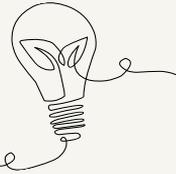
CALL A MEETING



PREP SLIDES



WHAT'S THE VISION?



WHAT'S THE MISSION OF THE COMPANY?

WHAT IS THE PURPOSE OF EACH OF THE FUNCTIONS OF THE ORGANIZATION?



WHAT ARE THE COMMITMENTS OF EACH FUNCTION FOR THE YEAR IN LIGHT OF STATED VISION?



WHAT ARE THE NEEDS OF EACH FUNCTION TO MEET THEIR STATED COMMITMENTS?



EXECUTE THE VISION!



Commit Yourself To:

- PRACTICING** good listening
- ASKING** open and honest questions
- USING** emotional regulation
- FINDING** ways to talk through conflict
- OFFERING** feedback
- MAKING** proper commitments



[LEARN MORE:](#)

[THE REBOOT PODCAST'S "WISDOM FOR WORK" EPISODES HAVE PRACTICAL SKILLS AND RELATIONAL SKILLS FOR ALL MANAGERS AND LEADERS.](#)

INQUIRY AS STRATEGY

How are things going?

When was the last time you paused to survey how things were going with your team, company, and organization?

Here you'll find a three-part leadership-level survey to help reflect on your team, the company, and yourself.

Give yourself a block of time to journal or work through [these questions](#). Then, take some time to read back through your responses. Where do you notice where you might need support?

1

Leadership Challenges

What topics below are relevant for you right now? What are the challenges you're having on the ones you've selected? What items would you add to this list?

- Impostor syndrome
- Time management and prioritization
- Relinquishing control
- One-to-many communication and being visible
- Personal decision making
- Founder/CEO vision and strategy
- Maintaining motivation & energy
- Personal health
- Transition
- Stress management and emotional balance
- Adequate training, experience and expertise
- Executive & management team strength, balance, temperament and overall dynamics
- Managing through conflict or stylistic differences
- Other(s):

2

What's Ahead?

Assess what you're looking towards, as you see it now.

- What are your major deliverables and goals for the next year?
- In what areas and to what degree is your role scaling in the next 12 months — headcount, products, customers, operations, etc.?
- Where do you spend your time today, and where do you want to spend your time in 12 Months (both within and beyond your organization)?
- What will hold you back from focusing on those issues between now and then?
- What would such successful rebalancing do for you, your organization, and others who matter to you?
- In your last performance review (or 360), what were your main strengths? What were your areas of development?
- As a leader, what are the top 3 things that keep you up at night?

3

You & Your Role

Reflect on the following:

- How clear are you about the mission of the company?
- How clear are you about your vision for the company?
- What is the opportunity (and/or what is necessary) at this time for you in your life?
- What does success look like for the company? How do you see yourself fitting into that picture (short and longer term)?
- How involved in the day-to-day execution do you want to be?
- Where do you want to be in 1, 2, 5, 10 years?
- What do you love doing? (What gives you energy?)
- What do you not enjoy doing? (What drains you?)
- What is your work to do in the company?
- What does the company need from you now?

A Healthy Organization Starts Here.

Track key elements, get unstuck, sleep better at night.

What is Your Dashboard?

What does your company need? What does your company want? A company dashboard can help you measure and track the key elements of your business so you can sleep better. [\[READ MORE\]](#)

Teamwork and Trust

How to do collective planning well? Having a clear vision is one thing. Leading a discussion and conversation about the vision and what that means for each function is another. How does one lead a dialog about important issues? How do we decide to move forward as a team? [\[READ MORE\]](#)

Doing Retrospectives

Reflecting retrospectively can help teams reap learnings. A retrospective is an opportunity to pause, zoom out, reflect on past actions, and draw out learnings so that you can carry those learnings forward in future decisions, actions, and processes. [\[READ MORE\]](#)

Tackle Tension

Meet conversational stuckness and tensions at the appropriate level, and put relationship ahead of task for clarity and ease in communications by using the I-We-It framework. [\[READ MORE\]](#)

Elements of Accountability

When you organize around a mission and a set of tasks, trust and dependability become the grease in the machine of a well-honed workplace. When we fail to uphold our commitments, we put much at risk. [\[READ MORE\]](#)

Recovering From Broken Commitments

When breakdowns happen, lean into growth mindset behaviors to readdress and recommit. Accountability starts within the individuals. How do we show up for our work together? [\[READ MORE\]](#)

Navigating Conflict

Conversations are a part of work life. Whether it's firing an employee or dealing with tension in the executive team, managing people at any level and in any scenario, makes difficult conversations inevitable and also essential to working well together. [\[READ MORE\]](#)

Red-Yellow-Green Checkins

The fundamental unit of doing that great work is conversation. Conversations happen easier, clearer, and more harmoniously if we can connect as human beings, look each other in the eye, trust, and feel safe naming what's up for us. [\[READ MORE\]](#)

Leading in Times of Volatility

How can curiosity, compassion, and creativity help us lead amidst choppy market conditions? Inquiry can help us understand our own motivations, improve our organizational awareness, and anchor our working relationships in value-seeking priority. [\[READ MORE\]](#)

JOURNAL PROMPTS

HOW IS THE FISHING?

In fishing cultures, when the fish aren't running and the action is slower, fisherpersons will turn to the tasks that fall through the cracks when things are busy, like mending the nets. If the nets aren't tended to, they become unusable when they are needed.

In our businesses, we have similar areas that we don't tend to when we're busy shipping products or tending to exquisite customer experience. Yet, many of these areas of our business are just as important as the systems and processes or tools we rely on in order to serve the needs of the busier times.

- If market conditions have created a new sense of pace, what nets have your attention and could use some mending?
- What shifts in the mindset of your leadership will support the surfacing of frayed team dynamics that need to be tended to?
- What are the tasks you can focus on in the business that need tending?
- In what ways might tending to holes in your nets strengthen and shore up resources or new ways of generating revenue?

MOVING THROUGH TRANSITION

IS THE TEAM IN TRANSITION?

[[LISTEN](#)] to Andy Crissinger, Reboot's Director of Coaching, share a helpful framework for leading teams through times of transition.

