Annual Strategy Process Guide



SUPERHERO SCALING JOURNEY

A practical, repeatable process to turn insight into focus, alignment and action, so your company scales with intention.

1 Retrospective

Learn from the past year: what worked, what didn't, and what needs to change.

KEY QUESTION

What worked, what didn't, and why?

2 Strategic Snapshot

Establish where we are now: performance, market, customers, capabilities, opportunities, risks and the bets each function believes are worth making.

KEY QUESTION

Where are we now, and what should we bet on next?

3 Leadership Offsite

Bring leadership together to challenge assumptions, debate opportunities and work through the questions that matter.

KEY QUESTION

What do we need to challenge, debate and understand together?

4 Strategic Choices

Decide what matters most, what you will prioritize, and what you will deliberately not do.

KEY QUESTION

What will we prioritize and what will we deliberately not do?

5 Strategy Validation

Test the choices against evidence, resources, dependencies, risks and relevant feedback, then refine before taking the strategy to the company.

KEY QUESTION

Does the strategy still hold when we test the assumptions, resources and risks?

6 Company Alignment

Turn the strategy into clear priorities, ownership and a direction the company understands.

KEY QUESTION

What does everyone need to understand, own and act on?

7 Quarterly Review

Review progress and assumptions, learn from execution and adjust when reality changes.

KEY QUESTION

What has changed and does our strategy still hold?

What you should have at the end

A clear, aligned and actionable strategy that the whole company understands and can get behind.

- A concise summary of last year's key learnings
- Validated market, customer and financial insights
- A clear strategic focus with 3–5 priorities
- Defined trade-offs and what we will not do
- A tested and refined plan with key assumptions
- A compelling narrative and communication plan
- Aligned leadership team and company-wide understanding
- A quarterly review cadence with clear metrics

Participants
CEO, leadership team, key functional leaders

Timing
4–8 weeks (typically Q4 for next year)

Inputs
Last year's results, market data, customer insight, team input, financial models

Outputs
Strategic plan, priorities, OKRs, communication plan, quarterly review schedule

Rules of the Road

1. Three clear priorities beat ten important initiatives.
2. Strategy requires trade-offs.
3. Be evidence-based, not opinion-based.
4. Involve the right people, but don't try to please everyone.
5. A plan is only valuable if it leads to action.

1. Annual Retrospective

A practical method to capture what actually happened before you plan what comes next.

Run the retrospectives team by team. Use AI to synthesize the notes. Then turn company reality into clear strategic input.



HOW IT RUNS

1 Run team sessions

Use existing weekly meetings. 60 minutes per group. Skip-level format: the direct leader does not join.

2 Size the groups

Aim for 6–10 people. Merge 2–3 person teams when it makes sense; split teams above ~12.

3 Capture raw notes

Assign a note-taker or use a recording/transcription tool. Preserve examples and actual language.

4 Synthesize with AI

Clean each team's notes, combine themes, then draft the retrospective worksheet for leadership review.

The three core questions

With 8–10 people, these alone can fill the hour. Use the question bank only when the conversation needs help.

- **What went well this year?**
- **What could have gone better?**
- **What should we start doing / do differently next year?**

WHAT IS INCLUDED

1 How to Run the Annual Retrospective

Full operating method: cadence, skip-level setup, group sizing and timing.

2 Team Invitation Message

Copy-ready note to explain purpose, questions and how the input will be used.

3 Skip-level Retrospective

When to choose and why.

4 Facilitator Guide

Opening script, ground rules, how to guide without defending or debating.

5 Question Bank

Follow-up questions for what worked, what didn't, what should change and looking forward.

6 Note-taking Guide

How to capture useful raw material without over-summarizing the conversation.

7 AI: Team Summary

Prompt to clean and structure one team's notes.

8 AI: Company Synthesis

Prompt to identify themes, differences, risks and strategic implications across teams.

9 Keep, Fix, Stop. Strategic Implications

The final working canvas: reflection, synthesis and strategic implications.

Final output

A concise company-level retrospective that shows what to keep, fix and stop, plus the key findings next year's strategy must address.

INPUT TO LEADERSHIP OFFSITE

2. Team Invitation Message

Copy-ready note to send before each retrospective session.

EMAIL / SLACK COPY

Hi Team,

In our next team session, we'll take a look back at the past year and capture the things we should carry forward into the next one.

This session is the first step in our annual strategy process. We'll start by gathering the team's perspective, then combine the themes across the company, use those insights to shape the leadership strategy session, and turn the outcome into next year's priorities.

Please come prepared to discuss three questions:

What went well this year?
What could have gone better?
What should we do differently next year?

Specific examples are especially helpful, they make it much easier to understand what is really working, where we are getting stuck, and what deserves attention going forward.

We'll capture the discussion, bring the themes together with input from the other teams, and use the combined picture as one of the key inputs into the annual strategy session.

The journey is simple: team input → company-wide themes → leadership strategy session → next year's priorities.

Looking forward to the discussion.

Practical notes

- Use the team's normal weekly meeting slot.
- Block 60 minutes.
- Explain that input will be synthesized, not quoted back as individual feedback.
- Ask people to think through examples before the session.
- Leaders listen before they explain, they should be last to speak up.

Tone to keep: Clear, calm and Specific

- This should feel like an honest company learning process, not a disguised engagement survey.
- Encourage examples over general statements.
- Leaders listen before they explain.
- If the team lead's presence may limit open discussion, run the session skip-level and share the consolidated themes afterwards.

3. Skip-level Retrospectives

If the team lead's presence is likely to materially reduce candor, for example, the team rarely challenges them openly, the leader tends to dominate discussion, or the retrospective includes concerns specifically about that leader's operating style, run the session without them and share the consolidated themes afterwards.

EMAIL / SLACK COPY

Hi [Name],

As part of the annual strategy process, we are running team retrospectives across the company. Your team's session will be run as a skip-level conversation, so you won't join that specific meeting.

This is not a review of you or your performance. We are using the same approach across teams so people can speak openly about how the company operates, including leadership, processes, cross-functional work and decisions that affected execution this year.

The output will be synthesized together with input from other teams and reviewed at company level. Individual comments will not be used as standalone feedback unless something requires a specific follow-up.

We'll share the broader themes once the company retrospective has been completed.

When to run a Skip-level Retrospective?

- When people are unlikely to speak openly with their direct leader in the room.
- When the team rarely challenges the leader or leadership decisions.
- When the leader tends to dominate discussion or shape the group's answers.
- When the issues you need to surface include leadership friction, decision-making or team dynamics.
- When you believe a skip-level setting will give you a more accurate picture of how the team actually experiences the organization.

What leaders should do?

- Let the team come in with their own perspective.
- Avoid steering the discussion toward preferred answers.
- Give people space to speak without follow-up pressure afterwards.
- Treat the output as company learning, not personal critique.

4. Facilitator Guide

How to run the session without turning it into debate, defense or therapy.

Opening script

“The goal today is to understand the past year from your perspective, what worked, what got in the way, and what we should carry forward into next year. We’re looking for patterns, examples and lessons that help us see how the company is really operating. This is part of the wider annual strategy process, and the themes from this session will be combined with input from other teams before leadership planning. You don’t need to agree with each other, and we don’t need to solve every issue in the room. What matters is that we surface the things that are worth learning from.

Please be specific where you can. Real examples are much more useful than general statements. We’ll work through three main questions: what went well, what could have gone better, and what we should do differently next year.”

Ground rules

- Talk about systems and situations, not personalities.
- Be specific. Examples beat vibes.
- Disagreement is useful; we do not need forced consensus.
- The facilitator is here to capture, not defend leadership decisions.
- We may ask follow-up questions, but we will not solve everything live.

Facilitation rhythm

1. Set context: 5 min
2. What went well: 15 min
3. What could’ve gone better: 20 min
4. What should we start doing / do differently next year: 15 min
5. Final check: anything important missing: 5 min

Facilitator’s tone

- Keep the conversation moving.
- Ask for examples.
- Invite quieter voices in.
- Let disagreement surface.
- Capture first, solve later.
- Leaders listen before they explain.
- Let people finish before stepping in.
- Park anything that needs a separate conversation rather than solving it in the retrospective.

When the room gets spicy

- Separate the issue from the person.
- Ask for the specific situation: **“What happened?”**
- Bring it back to impact: **“What did that cause for the team or the company?”**
- Let different views sit next to each other without forcing agreement.
- If the discussion turns into blame, reframe toward the system, decision or process.
- Capture the point clearly, then move on if the room starts circling.

Facilitator’s role

Help people speak openly, keep the conversation concrete and balanced, and capture the themes leadership needs to learn from.

5. Question Bank

Use these when the conversation needs more depth.

What went well?

- What helped you do your best work?
- What became easier this year?
- What should we absolutely keep doing?
- Which decisions made a positive difference?
- Where did the company support you well?
- What are you proud of?

What did not go well?

- What repeatedly slowed you down?
- Where did you waste time?
- What created unnecessary work?
- What kept breaking?
- Where were responsibilities unclear?
- What became more complicated than necessary?

What should change?

- What should we stop doing?
- What should we start doing?
- What should we do more consistently?
- What leadership change would materially improve your work?
- What did we keep saying was important but never prioritize?
- What problem are we tolerating?

Looking forward

- What will become a bigger problem if we do nothing?
- What capability are we missing?
- What do customers need from us that we are not delivering well enough?
- What would make next year meaningfully better?
- What should next year's strategy respond to?

Important With a 10-person team, three main questions are usually enough. Use this bank selectively to deepen the discussion and surface specific examples.

6. Note-taking Guide

Capture the raw material without flattening it too early.

How to take notes

- **Option A: AI note-taker**
  Record and transcribe the session using your usual meeting tool.
- **Option B:** Human note-taker
  Capture comments as closely as possible to how people said them.

What to capture

- Exact examples
- Repeated themes
- Strong disagreement
- Surprises
- Specific customer, product or process references
- “We kept saying X mattered, but Y always won” moments

Do not summarize live

- Bad note: “Process issues.”
- Better note: “The team said handoffs from Product to Engineering were often unclear, especially when requirements changed after planning.”

Tag as you go

Mark notes with simple tags so AI can synthesize later:

- [Worked]
- [Didn’t work]
- [Change]
- [Example]
- [Disagreement]
- [Leadership decision]
- [Customer impact]

Session notes structure

Topic / comment	Evidence / example

Note-taker rule

Preserve meaning first. Clean wording later.
Capture what people actually meant, including the context and examples behind their comments. Keep interpretation to a minimum, the goal is strong raw material that can be synthesized later without losing the team’s perspective.

7. AI Instructions: Team Summary

Use this after each team session to clean and structure one team's notes.

COPY THIS AI INSTRUCTION

Review the notes below from one team retrospective. Organize the summary under these three questions:

1. What went well this year?
2. What could have gone better?
3. What should we start doing or do differently next year?

Add a fourth section for Other important observations if something meaningful does not fit naturally under the three main questions.

For each theme, include:

- a short title
- a concise summary
- supporting examples
- whether it appears to be a strength, problem, risk or opportunity
- whether it was mentioned once, a few times, or repeatedly
- any clear cross-functional dependency or impact

Preserve the meaning, context and specific examples from the discussion. Where distinctive wording helps explain the point, retain it. Where people had different views, show the disagreement rather than forcing consensus. Do not assume the most frequently mentioned topic is automatically the most important. If something is unclear, incomplete or ambiguous, flag it as needs clarification rather than filling in the gap. Keep the output structured and concise enough to combine later with summaries from other teams. Do not add conclusions or recommendations that are not supported by the notes.

Here are the notes:
[paste notes here]

Quality check

Before using the summary, check:

- Did it preserve specific examples?
- Did it show disagreements where they mattered?
- Did it avoid inventing causes or conclusions?
- Is it clear what the team actually said versus what AI grouped or summarized?
- Did any important nuance disappear in the cleanup?
- Does the summary still feel true to the original conversation?

Human review

The facilitator should quickly review the AI output against the raw notes.

- Check that specific examples and important context have not been lost.
- Make sure disagreements or minority views are still visible where they matter.
- Remove anything the AI inferred but the team did not actually say.
- Keep the language close enough to the team's own wording that the meaning still feels true.
- Flag anything that needs clarification rather than smoothing it over.

8. AI Instructions: Company Synthesis

Combine all team summaries into company-level retrospective themes.

COPY THIS AI INSTRUCTION

Review all team retrospective summaries below and identify the strongest company-wide themes.
For each theme, include:

- short title
- concise summary
- teams that mentioned it
- 1–2 representative examples
- frequency: one team / several teams / widespread
- scope: company-wide / cross-functional / team-specific
- classification: strength / problem / risk / opportunity
- strategic relevance: low / medium / high

Group similar observations together, but preserve important differences between teams.
Flag:

- recurring strengths and problems
- cross-functional friction or dependencies
- issues that appear systemic
- themes employees experienced as repeatedly deprioritized
- low-frequency issues that may still have high strategic impact

Do not treat frequency as importance. Do not infer causes that are not supported by the summaries. If something is unclear, mark it as needs investigation. Do not add conclusions or recommendations that are not supported by the notes.

At the end, provide:

1. Company-wide picture: the most important strengths, problems, risks and opportunities
2. Leadership attention: themes worth examining during strategy planning
3. Open questions: anything that needs more evidence or clarification

Here are the team summaries:
[paste summaries here]

What good looks like

A strong synthesis does not just summarize. It shows leadership:

- what themes repeat
- where there is clear consensus
- where perspectives differ
- what is surprising or easy to miss
- what may point to a deeper underlying issue

Keep the nuance. Don’t turn different views into false consensus.

Watch out for

A clean summary is not the goal. A useful interpretation is.

- Treating the most repeated point as automatically the most important
- Averaging away disagreement or minority views
- Turning weak signals into confident conclusions
- Mixing facts, interpretation and assumptions
- Losing who said what when different groups see the issue differently
- Producing a polished summary that gives leadership nothing to act on

9. Keep, Fix, Stop. Strategic Implications

Turn reflection into useful input for the leadership strategy offsite.

Keep

What is working and deserves continued investment?

Fix

What must improve for us to move forward?

Stop

What are we spending time, money or attention on that no longer deserves it?

The things we kept saying were important

But never prioritized to do it.

Why did this keep happening?

- ☐ Not actually a priority
- ☐ No clear owner
- ☐ Insufficient capability
- ☐ Insufficient capacity
- ☐ Leadership kept overriding it
- ☐ Short-term work always won
- ☐ We underestimated the problem
- ☐ Other

What next year's strategy must address

If we change nothing, what is most likely to hurt us over the next 12 months?