PLANNING AND OPERATIONS

Quarterly Planning Agenda

[Team name]: [Q1 / Q2 / Q3 / Q4] [year]

MEETING DATE [Month day, year] · **LENGTH** 2 hours

Time	[00:00] to [00:00]	**Location**	[Room or video link]
Team lead	[Name]	**Notetaker**	[Name]
Attendees	[Names]		

01 Objective

Review last quarter honestly, then set [3] targets for the next one that fit the capacity we actually have.

Plan to about 80% of capacity. The rest gets used by work nobody planned for.

02 Before the meeting

- Team lead: fill in last quarter's results in the table below.
- Everyone: list planned leave and fixed commitments for next quarter.
- Bring one proposal for a target, with the number you'd measure.

03 Agenda (2 hours)

Min	Item	Lead	Purpose
25	**Review last quarter** Each target: hit, missed, and why. No defending.	[Team lead]	Discuss
10	**What we learned** One thing to repeat, one to change.	All	Discuss
35	**Set next quarter's targets** Pick [3]. Each needs a number and an owner.	[Team lead]	**Decide**
10	*Break*		
25	**Allocate capacity** Weeks or people per target, after leave and run work.	[Team lead]	**Decide**
15	**Checkpoints and risks** When we'll check progress, and what could knock us off.	[Notetaker]	**Decide**

04 Last quarter

Target	Goal	Result	Hit?	Why
[Target 1]	[0]	[0]	[Yes]	[One line]
[Target 2]	[0]	[0]	[No]	[One line]
[Target 3]	[0]	[0]	[Partly]	[One line]

MEETING RECORD

Quarterly Planning Agenda

NOTETAKER [Name]

05 Leave and fixed commitments next quarter

Person	Away or committed	Dates	Weeks
[Name]	[Leave, training, other project]	[Dates]	[0]
[Name]	[Leave, training, other project]	[Dates]	[0]
[Name]	[Leave, training, other project]	[Dates]	[0]

06 Next quarter

Target	Measure	Owner	Capacity	Checkpoint
[Target 1]	[From X to Y]	[Name]	[0 weeks]	[Date]
[Target 2]	[From X to Y]	[Name]	[0 weeks]	[Date]
[Target 3]	[From X to Y]	[Name]	[0 weeks]	[Date]

07 Capacity check

Line	Weeks
Total team weeks in the quarter	[0]
Minus leave and holidays	[0]
Minus run work (support, meetings, maintenance)	[0]
Available for targets (plan to about 80% of this)	[0]

08 Decisions, actions and parking lot

Type	What was agreed	Owner	Due
Decision	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Parked	[Topic, and where it goes next: meeting, email, next agenda]	[Name]	[Date]

09 Notes

[Anything else worth keeping: numbers quoted, open questions, who to follow up with]