

Quarterly Review Agenda

Review of Previous Quarter (20 minutes)

Goals from last quarter
Reflection on last quarter

Planning for Future Quarter (30 minutes)

Goals for next quarter
Activities necessary to achieve goals

Review of Feedback Form (25 minutes)

Discuss feedback responses
Discuss assessment responses

Collection of Metrics and discussion of client profile (5 minutes)

Summary of session and final comments (10 minutes)

- Quarterly reviews focus on skill development, identification of goals, strategies to achieve those goals, and provide a means for checking on accomplishments.
- Quarterly reviews are a mechanism used to gather evaluation data from clients and to gauge clients' level of satisfaction with the Uptown Innovation Center.
- Quarterly reviews assist in developing the relationship between the Center's personnel and the clients.

***“Seeking creative ideas, fostering innovation,
developing economic leadership.”***



Quarterly Review: Reflection on Last Quarter

Company Name: _____ Date: _____

Last Quarter's Goals:

- a.
- b.
- c.

Were these goals accomplished?

Were the results different than expected? Why?

What were some other accomplishments?

What was key to each accomplishment or lack thereof?

In retrospect, what kind of assistance might have been helpful?

What are you noticing about the development of the company?

What are some specific patterns or trends that seem to be emerging?

Are there alternatives you should be considering?

What new skills did you use this past quarter? How did you acquire them?

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Quarterly Review: Planning for the Future

Company Name: _____ Date: _____

What three (3) goals do you wish to set for the next quarter?

- a.
- b.
- c.

Clarification of Goals:

How do these goals support the business plan?

How might the accomplishment of these goals benefit the business?

What is the best that could happen with accomplishment of these goals?

What might be happening simultaneously?

How long will it take to accomplish these goals?

Indicators of Success:

How will you know when these goals have been accomplished?

What data are needed to measure accomplishment?

Where or how can they be obtained?

Strategies and Activities:

What needs to happen in order for these goals to be accomplished?

What do you need to do in order to accomplish these goals?

What support do you need to accomplish these goals?

What services offered by the Uptown Innovation Center are needed?

What factors are most (least) controllable?

Professional Development and Assessment:

What might you learn from the process of achieving these goals?

What do you want to make sure to do well?

Identify an area in which you wish to improve.

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Quarterly Review: Feedback

Company Name: _____ Date: _____

General: Please use the following scale as you provide feedback:

1 – Needs Improvement 2 – Satisfactory 3 – Good 4 – Excellent

Facilities	1-----	2-----	3-----	4-----
Technology	1-----	2-----	3-----	4-----
Services	1-----	2-----	3-----	4-----
Staff Support	1-----	2-----	3-----	4-----
Staff Skill Level	1-----	2-----	3-----	4-----
Staff Contact Level	1-----	2-----	3-----	4-----
Client Value	1-----	2-----	3-----	4-----

Programming:

In which programs, sponsored by the Uptown Innovation Center, did you participate this past quarter?

What would you like to learn from future programming?

Services:

What services offered by the Uptown Innovation Center did you use this past quarter?

Were any services you needed not made available to you? Please explain.

Value: What value did you receive from being in the Uptown Innovation Center this past quarter? (E.g., contacts, financial savings, networking, marketing support, etc.)

Comments:

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