Slides to Signals

Strategic Planning in the Age of AI

Alex Ribeiro | alex.ribeiro@teamform.co

01. **Learnings → Principles**

02. **How Quarterly Business Reviews are Evolving…**
From Slides to Signals

03. **Planning for Human–AI Teams**

👋 **Hi, I'm Alex**

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How much I like things

DIslike   Love

👋 **Hi, I'm Alex**

How much I like things

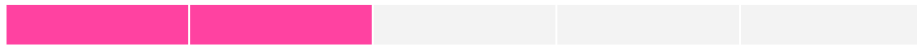🌎   Dislike   Love
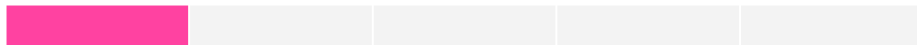
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🏃 ▮▮▮▮▮

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	Dislike				Love
🌎					
🏃					
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👋 # Hi, I'm Alex

My focus over the last 10 years

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📱 A Telco at a Crossroads

- – $2.5B Cost Reduction
- – 9500 Role Impacts
- – 1800 → 20 Products

🏛️ A High–Performing Bank

- – Top 15 by Market Cap
- – 17M+ Customers Served
- – Recognised leader in AI

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- Led the design & implementation of QBR… Twice!

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🛩️ **Now applying practices @ TeamForm**

Learnings
→ **Principles**

💡 **Principle 1**

> **'You do not rise to the level of your goals,**
> **You fall to the level of your systems'**
>
> James Clear, Atomic Habits

💡 **Principle 2**

'Dream in Years, Plan in Months, Ship Daily'

DJ Patil, Former U.S Chief Data Scientist

💡 **Principle 3**

'With Great Power,
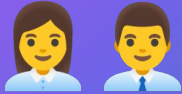Comes Great Responsibility'

💡 **Principle 3**

> **'With Great Power,
> Comes Great Responsibility'**
>
> Uncle Ben, Spider–Man

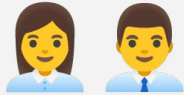# How Quarterly Business Reviews are Evolving...

The role of Quarterly Business Reviews

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Strategic Leadership Forum

Reflect on past performance, align on goals, and set direction

The role of Quarterly Business Reviews
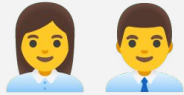
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Outcomes over Outputs

Defines what matters most to guide detailed planning & prioritization

The role of Quarterly Business Reviews

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Strategic Leadership Forum

Reflect on past performance, align on goals, and set direction

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Outcomes over Outputs

Defines what matters most to guide detailed planning & prioritization

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Rhythm

A set cadence to adapt to change and ensure ownership of outcomes

"If you don't know where you're going, any road will take you there."

Quarterly Business Reviews point the organization in the right direction.

🙋 **Show of Hands** 🙋‍♀️

Who regularly participates in a QBR?

The typical Quarterly Planning Process...

1. Direction Setting

– Macro Conditions
– Strategic Alignment
– Goals / OKRs

2. Preparation

– Artefacts
– Risks, Issues, Dependencies
– X–team Collaboration

3. QBR Forum

– Reflect on past Performance
– Debate Priorities
– Document Decisions

4. Finalization

– Communicate outcomes to Teams
– Big Room Planning
– Finalize Outputs

≈ 2–4 Weeks

Quarterly Business Reviews need to evolve

From static reporting sessions to dynamic, AI-augmented decision making forums

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From	To
Slides	Signals
Retrospective	Real-Time

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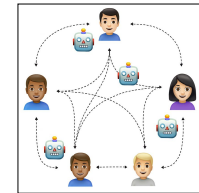| From	To
Slides	Signals
Retrospective	Real-Time
Constraints	Human-AI Capacity

Adopting AI in your QBR

Co-author your planning artefact & goals

Analyze your performance

Decision Support

Minutes / Note taking

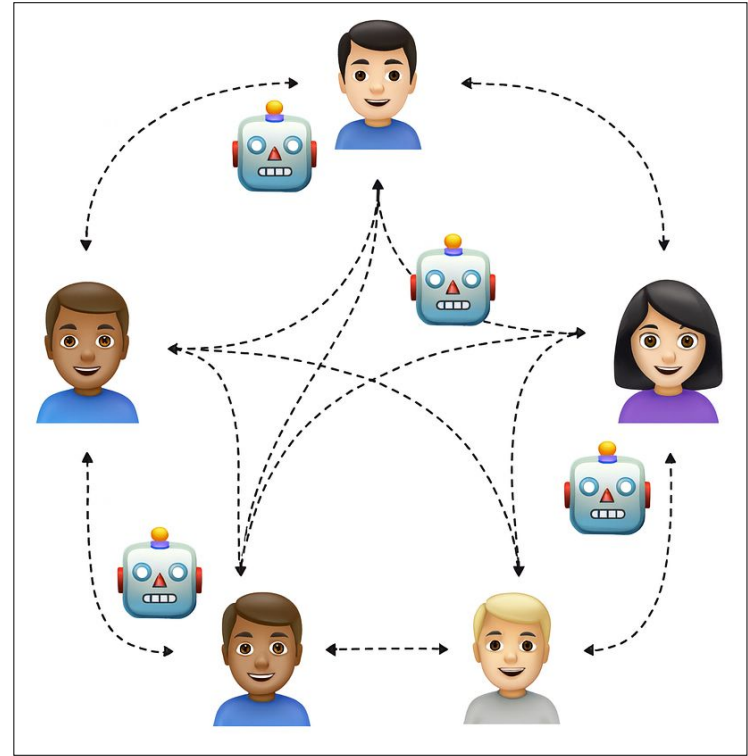Automated Risk Assessments

Scenario Planning

Research & Benchmarking

Planning for Human-AI Teams

Human–AI Teams will bring a new dimension to strategy & planning, with Agents joining as Teammates

Digital teammates will be spun up in minutes, embedded into a squad's workflow for a sprint or single task, and decommissioned just as quickly – **raising critical questions about roles, accountability, collaboration, and capacity.**

It's already happening

Human-AI Collaboration Lead

▇▇▇▇▇▇ San Francisco, CA

Apply ↗ · Save · ⋯

About The Role

We are hiring a Human-AI Collaboration Lead to develop a hands-on understanding of how people and AI can work together most effectively.

Shifts in Teaming:

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Fluid Teaming Models

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Role Reconfiguration

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Context is Critical.

Shifts in Teaming:

Planning the Transition:

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Shifts in Teaming:

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- 🤝 **Human-AI Collaboration**
- 🧠 **Role Reconfiguration**
- 💬📄 **Context is Critical.**

Planning the Transition:

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🚀 **Go Beyond Productivity**

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Planning the Transition:

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- 🚀 **Go Beyond Productivity**
- ▶️ **Play & Learn**

PENN & TELLER

Entropy

The measure of disorder, randomness, or uncertainty in a system...

Naturally increases over time unless energy is added to maintain order.

PENN & TELLER

The help I'm looking for…

Our mission at **TeamForm** is to **accelerate the path to Human–AI teaming.**

Join us in shaping the playbook – we'd love to hear:

- What challenges are you facing or anticipating with Human–AI teaming?
- How are you experimenting in your organization?

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