PILLAR 4 · STRATEGIC LONGEVITY: THE 20-YEAR HORIZON

Annual Strategic Review

Once a year, about two hours · a lighter check each quarter

Name

Year reviewed

Date

1 Energy: your recovery rhythm

Layer	What you planned	What actually happened
Daily		
Weekly		
Quarterly		
Yearly		

Personal tripwire	Did it fire?	What you did

Energy going into next year, 1 to 5 ____

If warning signs haven't lifted, seek support or talk to a professional.

2 Enterprise value: the six drivers

	Driver	Last year	This year	One action for next year
1	Runs without the founder day to day			
2	Recurring, predictable revenue			
3	No dangerous client concentration			
4	Documented systems			
5	A team that can lead			
6	A reputation bigger than one person			

3 Pivot radar

	Signal your market may be shifting	Trend
1		
2		
3		

Grove's question: if you were replaced tomorrow, what would the new leader do?

4 Re-run the system: book the dates

Structural Risk Audit	Decision-journal review	Next Leverage Map

Quarterly check 1	Quarterly check 2	Quarterly check 3

5 Next year's three priorities

	Priority	First step	By when
For yourself			
For the business			
The bet you're exploring			

Next Annual Strategic Review ____

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Annual Strategic Review

Example: the consulting firm's founder, a year after the program

Name: Founder
Year reviewed: 2027
Date: Jan 12

1 Energy: your recovery rhythm

Layer	What you planned	What actually happened
Daily	7+ hrs sleep; no big decisions after 6 pm	Mostly held; slipped in a busy March
Weekly	Saturdays fully offline	Held 44 of 52 weeks
Quarterly	3 offline days each quarter	Took 3 of 4
Yearly	Two weeks away in August	Took 10 days

Personal tripwire	Did it fire?	What you did
A week of poor sleep	Twice	Lighter week; handed off a proposal
Dreading Sunday evenings	Once, in Q2	Long weekend; moved a project to the team

Energy going into next year, 1 to 5: 4 — *If warning signs haven't lifted, seek support or talk to a professional.*

2 Enterprise value: the six drivers

	Driver	Last year	This year	One action for next year
1	Runs without the founder day to day	3	4	Team runs two accounts end to end
2	Recurring, predictable revenue	3	4	Convert two project clients to retainers
3	No dangerous client concentration	3	4	Keep every client under 20%
4	Documented systems	4	4	Refresh playbooks each quarter
5	A team that can lead	3	4	Promote a delivery lead
6	A reputation bigger than one person	2	3	Publish three client case studies

3 Pivot radar

	Signal your market may be shifting	Trend
1	Clients questioning research fees (AI)	Rising
2	AI-first competitors pricing low	Rising
3	Margins on analysis work slipping	Slow decline

Grove's question: if you were replaced tomorrow, what would the new leader do?

Stop selling hours of analysis and sell judgement: grow the AI-enabled advisory line.

4 Re-run the system: book the dates

Structural Risk Audit	Decision-journal review	Next Leverage Map
Feb 10	Mar · Jun · Sep · Dec	First Monday monthly
Quarterly check 1	**Quarterly check 2**	**Quarterly check 3**
Apr 7	Jul 7	Oct 6

5 Next year's three priorities

	Priority	First step	By when
For yourself	Take the full two-week break	Book August now	Jan 31
For the business	Team leads 80% of delivery	Promote a delivery lead	Mar 31
The bet you're exploring	AI advisory to 30% of revenue	Package the offer for partners	Jun 30

Next Annual Strategic Review: Jan 11, 2028