

# PLANNING WORKSHEET

## Quarterly/Monthly Planning

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There's a **lot** here: you do *not* need to do it all. As always, take what you like & leave the rest. This is by no means an end-all be-all approach to quarterly planning or planning in general.

Feel free to use it just to brainstorm, brain-dump, or to create your own "master plan". Some people like Excel spreadsheets, others like physical binders/vision boards, others Pinterest... and tons of people prefer to just jot down 3 things on a scrap piece of paper.. Whatever works for *you* is great.

Before starting below, it's a good idea to make sure you have everything you need: calendar, long-term vision/goals, phone, notebook, etc.

Here's a link to the [Google Doc](#) version!

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### 1. Review the last quarter/last months' progress. Take 5-10 mins to reflect on:

- Where did you make the most progress? (*celebrate a little!*)
- What worked? What systems, what processes, what beliefs?
- What didn't work?
- What goals did you not make progress on at all, or not make as much as you wanted to?
  - What happened? What got in the way? With that insight, is there something you can change in your approach for the next 3-months?
  - *Alternatively:* does this goal maybe not matter all that much?

### 2. Planning the Next Month/Quarter:

- **Pull out your annual or big picture goals for reference:** Review the items from your yearly goals that you want to bring into focus for the quarter
  - Is there anything on your annual list you've been avoiding?
  - Anything you want to revise in your annual goals? Or anything that's just *not* important anymore?
- **Where do you want to be at the end of the month/next 3-months?** What do you want to accomplish, what gets you excited, would make you proud, or bring you closer to your long-term vision?
  - Caveats: feel overwhelmed by this? Not sure how realistic any of your ideas are? Skip this - make the goal as simple as "make progress toward X goal" & then choose anything that gets you closer.
- **What 1-3 "domains of life"** do you want to make your priority for the next month/quarter?
  - Domains of life might include: work, mind/body, finances, time management, home, relationships, family

- What's the **most** important of all 3?
- **Now:** Make a list of sub-tasks and milestones for each goal: what needs to happen?
- **Now that you know what you want to accomplish in 3-months:** what 1-3 tasks could you get done by the end of *this* month?
- **Other potential things to consider and plan for**
  - **Review your calendar for the next 3-months:**
    - Are there any major deadlines or special events/travel? Anything that needs to be prepared for or prepared around?
  - **Close open loops:** Do you need to finish anything from last month? Do you have any projects that are 80-99% complete?
  - **Gut-check:** Can you “visualize” or “feel” everything in your long-term plans? Does anything feel “I don’t fully believe this”? Make a note of that.

### 3. Ways to “Use” This Brainstorm Session

- **Come back to it during your weekly planning or before our sessions:** what do you need to accomplish *this* week to make progress?

### 4. Possible Resources:

- a. [Domain satisfaction tracker](#)