


Week 13 Focus – Quarterly Check

In: Skills

Focus Question: What have you accomplished in this last quarter? What are the tasks you want to undertake in the next quarter?



"If you cannot do great things, do small things in a great way."
– Napoleon Hill

DESCRIPTION

In addition to building in time for weekly and monthly planning, it's also important that we build in time for quarterly planning. For some, it may be easier to break down annual goals into quarterly milestones and micro-projects. For others, you might work upwards from monthly themes and projects to quarterly plans.

A quarterly check in can look different for each virtual professional or business owner. From dedicating an hour for review to ear-marking a full day with the team to review and plan for the time ahead. Be sure to use the weekly, monthly and annual resources available to you in the workbook planner.

RESEARCH/STORY

Create a quarterly review day. Put a date on the calendar every quarter can help to update certain tasks. Set a date in your calendar to look at the following quarterly items:

A. **Review financials** – sales, expenses, revenue. What needs to be changed? Where is revenue going? What is cash flow like? What about the accumulation of debt?

What is the financial data saying? What is that status around invoicing and accounts payable.

B. **Update your metrics.** Complete your statistics.

What are the things you are tracking in the Monthly Daily Trackers?

Over the course of the last 3 months ask yourself:

- What are the patterns you are noticing?
- What has shifted?
- What has stayed the same?
- What are you surprised about?

C. **Note programming/services delivered:**

- What have you been doing?
- What has been selling?
- What engagements did you get – speaking, coaching, training?
- How much volume of work have you been involved in creating and/or delivering? What's working? What's not?

Ensure that you have a footprint or record of your work - What was the focus of your work, major achievements, contact details. Have you put a copy of material in your portfolio (digital or hard-copy)?

D. **Focus on project related work:**

- What are the projects you are STARTING?
- What are the projects IN PROCESS?
- What are the projects you are COMPLETING?

E. **Examine resourcing:**

What resourcing is helping you? Consider:

- Materials
- People
- IT

What are the contingency resources available?

F. **Content Creation and Visibility:**

- What is on your content calendar for the next series of time?
- What content have you created that you can scale or replicate?

Client/Customer log and statistics. How much coaching are you doing? What skills have you been leveraging?

G. **Organizational Learning Check Point**

- What's working and what's not?
- What key learning has been undertaken?
- What learning needs are there going forward?
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H. What are the other things you want to review?

I. **Looking ahead** – What are the main priorities for the next 3 months?

What are the creative projects which are going to pull you forward?

 **ACTIVITY**

Schedule in 15-30 minutes to undertake your quarterly review. It might include a selection of these questions listed above.

As part of the review you might also undertake or revisit any self-assessments such as Wheels you have completed.



SIDE BAR – For a Quick and Dirty Quarterly Check in, complete these six prompts:

1. What's worked well this quarter?
2. What hasn't?
3. What are your major successes?
4. What are the things you were surprised by?
5. What are you going to carry forward in terms of focus, habits and priorities?
6. What are you going to let go of?

List out your top 5 for the next quarter. Is there a special theme which is emerging?

In both the Coaching Business Builder and PlanDoTrack

I have included a Wheel of Small Business Mastery (page 8 in Coaching Business Builder, or page 27/28 in PlanDoTrack) and/or Virtual and Remote Work page 14 in PlanDoTrack).

Take a few minutes to score yourself and revisit where you are at. What has shifted? What new skills have you learned or started to master due to use? What new skills are required on the horizon?

CONNECTION TO THE WORKBOOK AND PLANNER

In addition to the wheels there are four sets of quarterly tools throughout the CBB Planner. Be sure to take some time to explore these tools in Section 5 of the Workbook/Planner:

Quarterly To Dos – Use this to capture key to-dos in each of the 4 quarters of the year. Some professionals will use this as a warehouse over the course of the year.

Quarterly reflections: Use the chart to capture:

- Projects
- Achievements
- Learning
- Opportunities

Quarterly Planner Sheet: Use the one page to identify your top 5 goals for that period, identifying projects, also highlight key task on each month (5 weeks outline per month)

Finally, join Jennifer for a live or on-demand quarterly planning session where she provides you with a step-by-step series of questions to think about for your quarterly plan.