

# Week 36 Focus – Weave it Together: Quarterly Check In

**Focus Question: What have you achieved? What's needed in this next quarter?**

## DESCRIPTION

Taking time to pause and undertake a quarterly checkpoint is important. Here we are at our next quarterly checkpoint. What are you noticing each time you undertake a quarterly review? What are common themes across the quarters?

The book's subtitle is "Putting the pieces together". What are the elements you want to fuse or combine?

## ACTIVITY

For this week's activity, you are invited to consider some, or all, of the questions I posted in my March 2019 article for the Coaching Tools Company: Help Clients Pause, Take Stock with a Quarterly Review or Retreat <https://www.thecoachingtoolscompany.com/create-a-pause-for-clients-via-quarterly-reviews-or-retreats-by-jennifer-britton/>

Start by reviewing the past quarter:

- What were your major achievements this quarter?
- What do you want to celebrate?
- As you consider the goals (and resolutions) you made at the start of the quarter, how are you doing with these on a scale of 1-10?
- Which activities are becoming new habits?
- What is something you can check off?
- Which goals need to be adjusted or let go of?
- As a leader/coach/business owner, what have you noticed about your team this quarter?

Answer the following:

- The thing that has helped me be most productive this quarter has been \_\_\_\_\_.
- The thing that helped me be most successful this quarter has been \_\_\_\_\_.
- The thing that has helped me be happiest this quarter has been \_\_\_\_\_.
- What has helped me be most healthy has been \_\_\_\_\_.
- What I have noticed about my work/productivity/results and/or relationships this quarter is \_\_\_\_\_.

Also take note of any key metrics which are important for you, and your work. For corporate leaders, metrics may be progress on key KPIs (Key Performance Indicators). For small business owners, key metrics may include revenue, items in the pipeline and social media targets.

Looking ahead to the next quarter:

My priorities are:

1. \_\_\_\_\_



"Exceptional performance is preceded by regular reflection, iteration and practice."  
– Jennifer Britton

2. \_\_\_\_\_

3. \_\_\_\_\_

**Our team/business priorities are:**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**My goals are:**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Other questions to consider:**

- This quarter, I want to \_\_\_\_\_.
- I'll be really happy at the end of this quarter when \_\_\_\_\_.
- I also need to think about \_\_\_\_\_.

## **ACTIVITY**

**Depending on your style you may opt to:**

- Complete these questions and undertake your own quarterly review process
- Participate in a quarterly review session with Jennifer (these run for one hour)
- Join Jennifer for the four-hour PlanDoTrack Virtual Retreats. More information and registration at <https://www.coachingbusinessbuilder.com/plandotrack-virtual-retreats.html>
- Complete the Quarterly Worksheet and Video (<https://www.youtube.com/watch?v=9f4ESiJN8ko>)

## **CONNECTION TO THE WORKBOOK AND PLANNER**

**Refer to the Quarterly Tools including:**

- The Quarterly To-Do list
- The Quarter in Review
- If you are interested, explore the supplementary supports listed above