

Quarterly Strategic Planning

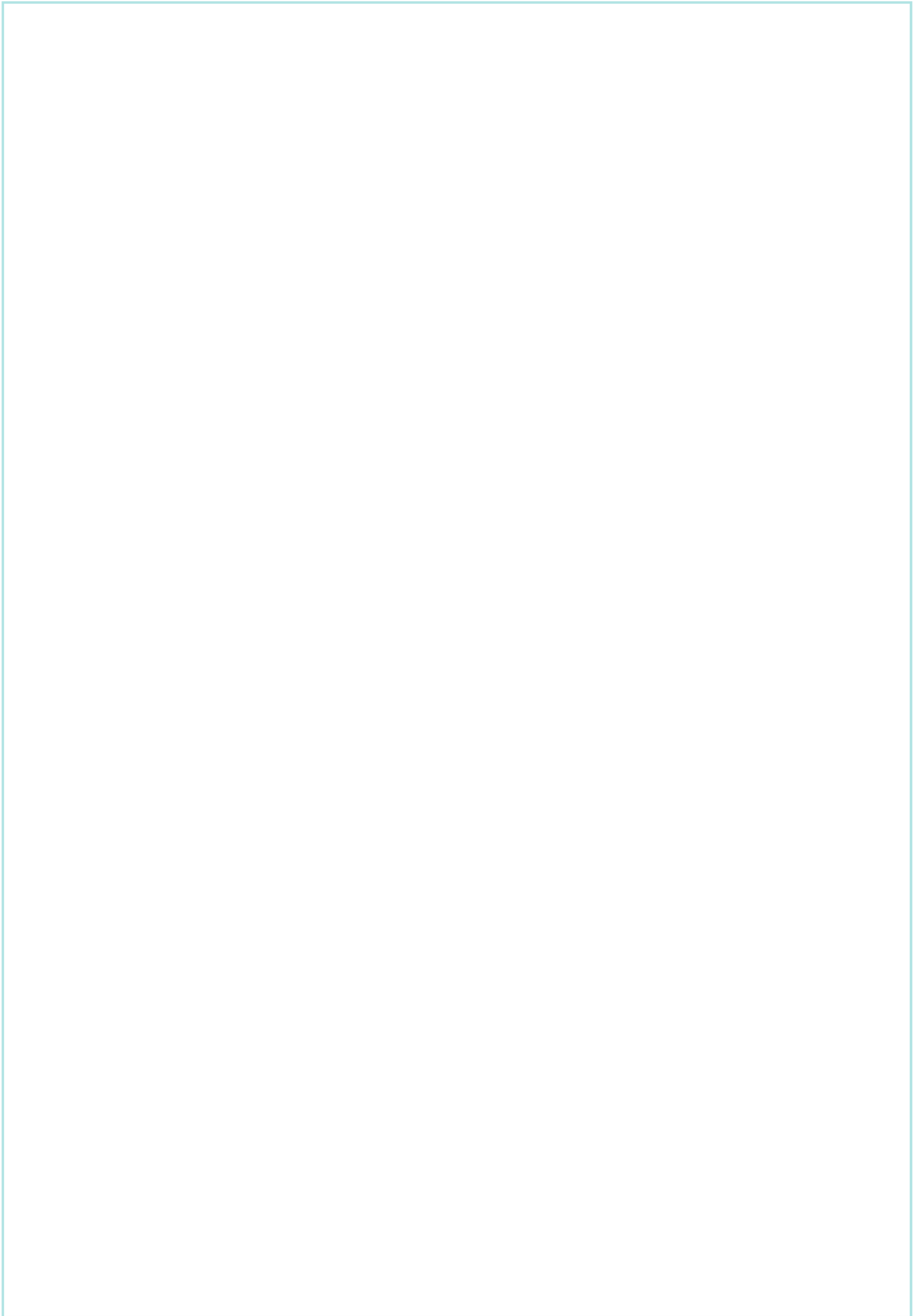


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Acknowledge Your Wins!

Before you go forward, it helps to look back at your wins from the last quarter.

WINS

A large, empty rectangular box with a thin blue border, intended for the user to list their wins from the last quarter.

Your Strategic Plan

Q _____ Year _____

Goal

Rock

Rock

Rock

Tasks

Tasks

Tasks

Tasks

Tasks

Tasks

Your Success Path Q_____

Goal

Rock

Rock

Rock

Tasks

Tasks

Tasks

Tasks

Tasks

Tasks

Your Success Path Q_____

Goal

Rock

Rock

Rock

Tasks

Tasks

Tasks

Tasks

Tasks

Tasks

SMART Goals

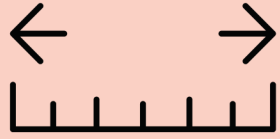
S

Specific



M

Measureable



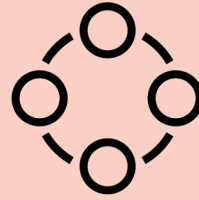
A

Achievable



R

Relevant



T

Time-bound



What additional business support goals do you want to achieve in _____?

These can be things that operate in the background to help you focus on the Success Path. Examples can be hiring team members, setting up SOP's or incorporating a new time management routine. Let's also make sure they are SMART goals!

To keep it focused, limit this to TWO goals.

Examples:

- *"I will block off Thursdays and Fridays for at least three hours to practice my workshop."*
- *"I will set up an SOP for operating my Email Service Provider."*

Business Support Goal 1

Business Support Goal 2

What actions do I need to make this happen?

Examples:

- Schedule a conversation with a team member
- Schedule time blocks in my calendar for when I work on this goal

What self-care goals do you have for Q____:

How will you take care of yourself, mind and body to achieve optimal success in Q___? Let's also make sure they are SMART goals!

Examples:

- *"I aim to get at least 8 hours of sleep Monday through Friday"*
- *"I will take at least TWO 20 minute breaks during the day where I either take a quick walk or do yoga"*
- *"I will give myself ONE DAY off each month to do NOTHING!"*

Self-Care Goal 1

Self-Care Goal 2

What actions do I need to make this happen?

Examples:

- Block of time in my calendar for self-care events
- Have a conversation with someone in my life



Keep, Stop, Start. A Monthly Practice

At the end of a given month, you may realize that to achieve your goals there are some things that need to change and some things that need to stay the same. It can be helpful to think of the practices that you have that work, and maybe some of them that don't.

At the end of the month, schedule some time to ask yourself what you should KEEP Doing, STOP Doing, or START Doing to ensure you are accomplishing your goals and tasks.

Month/Year _____

KEEP	STOP	START