

# Quarterly Planning Cheat Sheet

*Building your business one quarter at a time*

## Step 1:

### Anchor Your Vision

Write your 12-month end state in present tense.

#### Prompt:

"It's [Month, Year] and my business feels..."

Keep it emotional, not just financial.

**Tip:** If you can't describe how it feels, it's not clear enough.

## Step 2:

### Define Your Core Priorities

Choose three focus areas that matter most this year.

They become your decision filter for what deserves time, energy, and attention.

#### Ask:

- What three things would move my business forward the most?
- Which ones reduce friction or create capacity?

#### How to use:

List your priorities, why they matter, and how success looks.

## Step 3:

### Create OKRs for the Quarter

OKRs (Objectives + Key Results) turn focus into measurable progress.

**Objective:** What you want to achieve.

**Key Results:** How you'll measure success.

#### Ask:

- Which part of my vision needs traction now?
- What measurable results prove progress?

## Step 4:

### Review & Recalibrate

End each quarter with reflection.

#### Prompts:

- What worked?
- What felt heavy?
- What became clearer?
- What will I simplify next quarter?

#### Quote at the bottom:

"Awareness, not perfection, is what keeps you on course."