

Quarterly Planning Process

Instructions - Overall

Do your best to complete this process linearly, one step at a time. Each step naturally flows into the next. It's fine to read or skim through all the steps in advance if you want, or you can read and complete each step before you look at the next one.

Each step includes a template that you can copy and paste into your reply. Just fill in the details. Feel free to modify the template to suit your preferences.

You don't have to answer every question. The questions are intended to stimulate your thinking and to help you develop goals that you're likely to achieve. Use them as a base, but feel free to customize this process to suit your situation.

Be as honest as you can, neither too harsh nor too generous with yourself, especially with Step 1.

Try to relax into the process with a sense of curiosity. Set your worries aside, realize that we're all here to support you, and simply do your best to complete each step. It's fine to offer up imperfect answers, to make mistakes, and to change your mind later. By going through the process as best you can, you'll sharpen and clarify your goals for the next quarter, increasing the likelihood that you'll achieve them.

Instructions for Step 1: Review Recent Progress

Step 1 of this process is to review your recent progress, especially focusing on the previous quarter that is now coming to a close.

This is a truth alignment exercise, so we want to take a look at the facts. What actually happened during the last quarter?

What went well? What wins, gains, or successes did you experience? What didn't go well? What do you wish had turned out differently?

You can do this part from memory, but it's better to review your calendar, notes, emails, or other records that remind you of recent events. It's easy to overlook meaningful items if you only rely on memory.

Acknowledging small wins from the past quarter is especially worthwhile because it can boost your self-esteem and confidence before setting goals for the next quarter. Even if you feel a bit disappointed with the past quarter's results, you probably still made meaningful progress in some areas when you look at 90 days of your life. Be sure to give yourself credit for progress made and for any worthwhile experiences you may have had.

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Step 1 Template

What were your wins, gains, and accomplishments from the past quarter (big and small)? What went well? [Bold the most significant items.]

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What were your disappointments, setbacks, and regrets from the past quarter (big and small)? What didn't go so well? [Bold the most significant items.]

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What do you wish you'd done differently during this past quarter? If you had a chance to undo and redo anything, what would you change? [Bold the most significant changes.]

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How would you currently rate each area of your life on a 1-10 scale?
[Replace each X with a number between 1 (terrible) and 10 (awesome).
Feel free to modify this list to suit your situation.]

- X - Habits & daily routine
- X - Career / work / business
- X - Money & finances
- X - Health & fitness
- X - Learning & skill building
- X - Intimate relationships
- X - Social life
- X - Home & family
- X - Emotions
- X - Character growth & story progression
- X - Sense of meaning / purpose / contribution
- X - Overall lifestyle

What's your personal, subjective assessment of the past quarter? How do you feel about the last 3 months of life you just experienced? How would you describe your relationship with this past quarter?

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How would you summarize the story progression of your previous quarter? What happened in this chapter of your life? What title would you give this chapter? [I recommend writing this in the 3rd person, as if someone else wrote the summary about you.]

Chapter Title: _____

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As you reflect back on the past quarter and consider your current situation, what desires can you identify? What would you like to experience in the next quarter? What kind of relationship would you like to have with life or reality during the next quarter? [There's no need to be too specific with these desires yet, so general statements are totally fine here. We'll work on the specifics in the upcoming steps.]

STEP 2

Welcome to Step 2! In this step you're invited to define some goals for the upcoming calendar quarter. Don't worry about getting them perfect since you'll have the opportunity to refine them in Step 3. Think of this as your first draft.

Instructions for Step 2: Define Goals

Here we're focusing on goals that can be achieved within the next calendar quarter. That's about 90 days or 13 weeks. So we're not dealing with super long-term goals here.

This process is intended to help you get into a rhythmic quarterly flow that helps you advance in the direction of your desires. Your quarterly goals could be smaller pieces of major, life-altering goals or longer projects; or they could be more modest projects that will improve your life one small step at a time.

You can define as many or as few goals as you'd like. For many people, 3-6 goals is a healthy number. You can define other projects and to-dos as well, but your goals represent the most significant results you'd like to see during this time.

If you dislike the word *goals*, feel free to use whatever labels you prefer, such as *intentions*, *desires*, *results*, *objectives*, *OKRs* (objectives and key results), *outcomes*, *experiences*, *destinations*, *quests*, etc.

Try to eliminate fuzziness in the definition of your goal. Make the goal definition close to binary (either you achieved it or you didn't) with a crisp transition between pre-achievement and achievement. A good test for a well-formed goal is that you could visualize it as a movie scene, like you're watching a future memory.

Balance short-term urgency with long-term progress by asking for each goal: *Will this goal matter in 10 years?* Seek to have at least some goals on your list that could have meaningful, long-term impacts if you achieve them.

Also think about balancing your life with goals in different areas, like having a health goal, career goal, social goal, travel goal, skill-building goal, etc. Setting goals only in one area can be okay if you want to have a mono-focused quarter, but you may enjoy the quarter more and find

your motivation more sustainable if you pay attention to your overall life balance.

Feeling some compassion for your future self can help you set worthwhile goals. At some point you'll be 90 days into the future, looking back on this quarter. Project yourself to that future point, and look back on this moment now. What results will you wish you'd achieved (or at least made some progress with) during this upcoming quarter? What goals do you currently wish your past self had committed to 90 days ago?

Here are some examples of malformed goals:

- **Make more money** – vague, hard to tell when it's achieved, unlikely to motivate specific action in a clear direction, more socially conditioned than personal
- **Get in shape** – vague, doesn't motivate specific action, could mean anything, also socially conditioned rather than personal
- **Write a novel** – a little better but still fuzzy. Just the first draft or a final edited version? Published or unpublished? Does 50 pages count?
- **Develop and launch a new course** – a bit fuzzy unless you've already done other launches and have a process to follow, a good start but could use more definition. What kind of course? What format? Launch it how and to whom?

Here are some goals that are more clearly defined:

- **Run a 7-minute mile** – crisp definition, nicely binary (either you did it or you didn't), fairly easy to flow into meaningful action steps (like doing practice runs for speed or hiring a running coach), easy to track progress, easy to turn into a social goal by inviting others to train with you, we can picture this achievement on a movie screen
- **Have a one-hour or longer, in-person conversation with a new friend** – easy to visualize, definition of *friend* might be vague but the one-hour conversation standard is crisp enough and helps to clarify what crosses the border from stranger to friend, binary in that this event either happened or it didn't, not sure about the *why* though but could be a nice milestone for improving one's social life
- **Move into a one-bedroom apartment in Toronto with a one-year lease** – reasonably binary, easy enough to visualize, provides decent constraints, actionable

- **Build my email list to 2500 subscribers** – binary, we can visualize seeing the count on a screen increasing from 2499 to 2500 so it's an event, helps define actions, could use some extra definition on what types of subscribers since the quality of the list is likely important too
- **Get out of bed by 5am every day this quarter (and never use snooze)** – crisp and clear, nice recognition of the risk of snoozing, develops your character into an early riser, could mesh well with other positive practices like morning exercise or meditation

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Step 2 Template

#1

If you could name just one area of life or one particular project where you'd like to make meaningful progress this coming quarter, what would it be? [Health, relationships, finances, marketing, family life, video skills, travel, etc]

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#2

Imagine you're 90 days into the future, looking back on this new quarter. Which accomplishments would you like to see completed during this time? What specific results do you think you could achieve if you took sufficient action? [This is where you take a stab at listing your goals for this quarter.]

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#3

How would you like to advance your story during the next quarter? What would you like to experience during this next chapter of your life? Give this new chapter a title as well. [I recommend writing this in the 3rd person. Think especially about the relationship you want to have with life or reality during this next quarter.]

Chapter Title: _____

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#4

What long-term difference would it make if you actually achieved these goals? What future ripples might still be present 10 years from now? What might your future self appreciate about this next quarter, while reflecting back on it from 10 years into the future?

Step 3

Welcome to Step 3! In this step we'll review the goals you defined in Step 2 to improve their clarity, balance, and alignment. The intention is to help you set goals that you're more likely to achieve, so you can improve your results this quarter.

Instructions for Step 3: Align Goals

This step will guide you through a list of questions to reflect upon your goals, giving you the opportunity to further refine them. Think of this as goal debugging. We're looking to spot potential problems early, so we can fix them in the goal formation stage.

Sometimes defining or framing a goal a little differently can make it significantly more achievable. A good example is turning a purely personal goal into a socially beneficial one, which can help you leverage more social support and accountability.

Here are some standards to consider when reviewing your goals:

- **Clear** – Are your goals crisply defined as events, or are they vague and fuzzy?
- **Actionable** – Do your goals suggest reasonable action steps to move them forward?
- **Achievable** – Could you actually accomplish these goals in 90 days?
- **Ambitious** – Are you thinking big enough while still being practical and grounded?
- **Aligned** – Do these goals fit your personality and values?
- **Motivating** – Do these goals feel motivating to you? Do they invite you to take action?
- **Balanced** – How will these goals affect your lifestyle? Could you work on them sustainably without burning out? Can you maintain a healthy relationship with these goals as you work on them?
- **Significant** – Do these goals really matter to you? Do you care about them enough to invest in them? Do you find them meaningful at this time in your life?
- **Personal** – Are these your own goals, or are you letting social pressures dictate your path?
- **Contributing** – Will your goals benefit anyone other than you? Will anyone else care?

Some questions below may resonate with you strongly, encouraging you to change or replace some goals. Other questions may not be as personally meaningful to you. Feel free to skip questions that don't seem interesting to you, and invest more thought in those questions that spark useful insights.

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Step 3 Template

Copy and paste the desired results you identified in Step 2, so you can use those goals as a starting point.

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Specificity: Review your goals to make sure they're clear and specific, with a reasonably sharp border between unachieved and achieved. Can you picture the achievement of each goal as a future memory playing on a movie screen? [Feel free to sharpen up any overly vague or fuzzy goals here.]

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Ambition: Do any goals seem too big or too small for a 90-day timeframe? Would you like to upgrade any goals to be bolder? Would you like to downgrade any to be more relaxed? Would you prefer an easier quarter, or are you in the mood for a real challenge? [Consider the lifestyle impact of your goals.]

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Motivation: Do these goals feel motivating or inspiring to you? Do they invite you to take action? Do these feel like the right goals for you to explore at this particular time in your life? Are there any sprinkle goals cluttering your list that you may want to revise or drop?

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Ownership: Are these YOUR goals? Are any of these goals "shoulds" that you inherited from society, or did you consciously chose them for yourself? Could you adjust any goals to make them more uniquely your own, infusing them with your personality and style? [Turning a generic goal into a more personal one can make it more motivating, meaningful, and rewarding.]

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Synergy: Do any goals seem to conflict with each other? Would you like to drop any goals that don't mesh well with the others? Could you make any changes to these goals to increase their synergy, such that progress in one goal helps you achieve other goals? [Example: Pursuing health and fitness goals can boost your energy to achieve income goals.]

Ripples: Which of your goals will benefit only you? Which goals have the potential to benefit other people or create positive ripples beyond yourself? Could you modify the purely personal goals to make them more socially inclusive or beneficial? [It's okay to have some purely personal goals, but consider the ripples too. Socially inclusive goals can increase accountability and motivation, thereby boosting your chances of success.]

Purpose: What's your big picture *why* for pursuing these goals? Why do you care about them? How will these goals develop your character and advance your life story? What will these goals do for your relationship with life or reality?

Taking into account any modifications you've made to your goals in this step, how would you restate your goals for the upcoming quarter?

These are challenging questions. Refining and aligning goals is difficult work and often requires deep thought. The effort is worthwhile though. If you invest this level of thinking and refinement up front, you're more likely to set goals that you'll actually achieve. This is especially important if you have a prior history of haphazardly setting goals that fell off track.

Keep it up! In [Step 4.2](#) we'll identify action steps to help you get started on these goals.

Step 4

In Step 4 we're going to identify some action steps to get started on your goals. Now that you've defined your desired results, how are you going to achieve them within the next 90 days?

Instructions for Step 4: Identify Actions

For some goals you may want to list out as many action steps as you can identify, perhaps creating a complete plan from start to finish, but for many goals this is unnecessary and might cause you to get bogged down in excessive analysis. In most cases you only need to identify a basic strategy and a few action steps to get started, and then after you do those steps, you'll be able to identify more. Many interesting goals can eventually be achieved just by looking a few steps ahead at each point until you're eventually crossing the finish line.

A goal will often begin with action steps related to research, study, or learning, so you can better understand how to achieve the goal. Another possible starting point is communicating with others to coordinate responsibilities or to enlist social support, like sharing and discussing your goals with a relationship partner. And yet another common starting point is to make some early decisions, like which travel destination to select for a travel goal.

Try to make your action steps simple, clear, and concise. A good standard is that each action step can be done in one sitting, preferably in less than an hour. If your action steps are long and complex, the risk of procrastination can increase, especially if it isn't clear how to begin.

It's a matter of personal preference how big or small to make your action steps. Some people feel comfortable defining actions in larger chunks, especially if they've completed similar actions before. Other people find it difficult to take action until they've listed very granular steps that are under 15 minutes each, so they know exactly what to do to get started. Would you rather check off 10 15-minute tasks or a single 150-minute task? Would a 60-minute task motivate you to get started, or would you prefer a 5-minute task?

I recommend making your first few action steps simple and easy. Even a 2-minute task is good if it gets you started. It's wiser to build momentum

and consistency with small, achievable actions than to try to bite off too much too quickly and burn out during the first week or two.

Good action steps are clear enough that you could visualize someone doing them on a movie screen. The exception is when you're doing purely mental work inside your head, like making a decision, but even mental work creates evidence such as writing down a decision or typing up additional action steps based on a decision.

Here are some examples of poorly defined action steps:

- **Do some marketing work for my book** – this could mean anything, doesn't provide your brain with clear instructions or expectations, endless with no crisp finishing point, encourages procrastination
- **Research fitness online** – pretty vague and could become an unfocused time sink that devolves into random web surfing, try to lock this down with a specific type of fitness result in mind, specify how the research is to be done (via Google, asking friends on social media, asking CGC members, etc), consider timeboxing it too (like a one-hour limit) to help you stay focused
- **Go on a date with someone new** – not immediately actionable, you probably need to identify and ask someone first, really a complex series of action steps rather than a single action

Here are some examples of reasonably well defined action steps:

- **Set my alarm for 5am every weekday** – simple and clear, fast and easy
- **Buy a new iPhone 12 Pro, 256GB model, gold color at the local Apple Store** – clear and specific, separates the research (which model to buy) from the purchasing action
- **Write and publish a new blog post about overcoming procrastination** – clear enough, you could break it down into even more steps if this seems like a big task to do in one sitting (brainstorming ideas, outlining, writing the first draft, editing, publishing, sharing on social media, etc)
- **Spend one hour researching gym-based weight training workouts for beginners via Google, and compile a list of appealing options** – pretty clear, directly actionable, timeboxed to encourage focus instead of merely web surfing
- **Invite my spouse to have a sit-down talk to go over my goals for the quarter, tell her I'd love her support, share the potential risks and how I intend to deal with them, ask**

about any potential objections, and write down those objections to later develop solutions – addresses social alignment, conversation has a clear purpose (assess likelihood of support and surface objections), readily leads into additional action steps to devise and implement solutions to objections

For organizing your goals and actions, it's wise to use some type of structured system to help you stay organized. Your choice of system is a matter of personal preference, and it may take some experimentation to find or create a system that works for you.

Here are some recommendations:

- Any notes app, text editor, or to do list app
- A paper list, paper notebook, paper planner, or work journal
- Things – popular personal task manager
- Todoist – another popular personal task manager
- Nozbe 1 – my current favorite, quick to learn and fast to use, based on David Allen's popular Getting Things Done system
- Asana – web-based project manager, lots of features, good for team projects
- Monday – heard many recommendations for this
- OmniFocus – popular personal task manager for Mac / iOS
- Ultraworking's Work Cycles 1 – free templates (Google spreadsheets) to help you get your work done in short cycles
- Freedom – popular app & service for blocking online distractions while you do real work, use this every day if you have a habit of over-checking email or social media

Feel free to share other recommendations, so we can expand and improve the list above.

To advance your goals, you'll need to allocate time for them. When and where will you actually work on each goal? Will you exercise to advance your fitness goal first thing in the morning or before dinner? Which part of each week will you assign to your online business goal? A goal cannot advance unless you assign it some time.

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Step 4 Template

Strategy: What strategy, process, or approach will you use to advance each goal to completion? What apps, tools, or services will you use? When and where will you work on the goal? [Think through the details of how you'll get started, build momentum, track progress, and maintain consistency.]

Goal: _

Strategy: _

Actions: For each of your goals, identify 2 or more initial action steps to move the goal forward from where you are now.

Goal: _

- 1.
- 2.

Support: Which people will likely support your goals? Which people could slow you down? How could you invite more social support and reduce social drag? [You may want to share your goals with supportive people, avoid sharing your goals with unsupportive people, and decide how you'll handle predictable boundary issues that may arise. And of course you can leverage CGC's community for extra support, resources, and accountability.]

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Commitment: Are you ready to commit yourself to advancing (and ideally achieving) your goals during the next 90 days by taking action? If so, please express that commitment here in whatever manner feels good to you.

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This is a good time to get yourself organized. Using whatever type of system you prefer, set up your goals and the initial action steps. For instance, if you use a task manager app, you can create one or more projects for each of your goals and add some action steps. Also add relevant items to your calendar, such as recurring blocks of time to work on specific goals. Set yourself up for a successful quarter in advance.

Some people also like to post their goals in their home or workspace. Giving your goals a presence in your physical environment can improve your focus. Alternatively, tell one of your devices to remind you to look at your goals at a certain time every day. Another option is to change your screen wallpaper background on your favorite devices to remind you about your top goals.

You made it this far. Just one more step 2 to go...

STEP 5

In our fifth and final step, you'll begin taking action to advance one or more of your goals. It's a simple step but an important one.

This step will also encourage you to leverage accountability to increase your likelihood of success.

Instructions for Step 5: Build Momentum

To begin this step, please go ahead and complete at least one action step to advance one of your goals. It's best if you can do that first before completing the rest of this process. Give yourself the gift of moving a goal forward.

An excellent starting point for getting into action is to create a CGC progress log. See [this thread](#) for instructions and tips on how to create your own progress log.

If you're already maintaining one or more progress logs, this is a good time to update them. You might want to close out old logs (such as by posting a final entry letting everyone know you're done with it). You could also share your new goals in one of your existing logs to freshen it up.

If you want to start a fresh quarterly log, be sure give your logs a clear enough title, so other members will know what it's about. Here are some recommended ways to title it:

- Progress Log: Your Name (Q1 2021)
- Progress Log: Your Name (Q1 2021, your top goal)

If you do begin a new progress log, I suggest listing your quarterly goals in your log's first post. Let us know what you're seeking to achieve. If you share your goals with the community, it increases the likelihood that another member may be able to help you, such as by recommending resources or inviting you to join a mastermind group.

Additionally, you may want to set a recurring appointment on your calendar (like once a week) to update your progress log. If you regularly share progress updates, this will help you take action on your goals, and it will also invite more group energy to support your continued progress.

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Step 5 Template

#1

What actions have you taken so far to directly advance one or more of your new goals? What have you done to move them forward?

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#2

What are you doing to prepare yourself for a successful quarter, get organized, put intelligent systems into place, start building aligned habits, and reduce foreseeable risks? [Think of the first week as setting the tone for the whole quarter.]

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#3

Do you have any progress logs related to these goals? [Feel free to share links to them here if you do.]

—

#4

What side effects or consequences can you predict from the pursuit and achievement of these goals? What other changes may come along for the ride (socially, emotionally, financially, etc)? Do you feel any resistance to these side effects? If so, how could you get closer to welcoming and accepting the anticipated consequences as part of the overall goal package?

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#5

How would you like other CGCers to help and support you in the pursuit of your goals this quarter? What can we do to help you make progress? Would you like more encouragement, advice, resource suggestions, book recommendations, virtual hugs, sympathetic listening, playful teasing, tough love, virtual ass kicking, etc? What kind of support would you welcome during this time? [This would be good to share in your progress log as well.]

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#6

Imagine that it's 3 months from now, and we're just beginning our next CGC quarterly planning session. Imagine that you're doing Step 1 and reviewing what you got done during this quarter. Share a sample of what you'd like to post at that time, letting us know how this quarter turned out for you. [Then you can look back on this post 3 months from now and see how accurate you were.]

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