

Let's make great progress!

QUARTERLY PLANNING

Review Last Quarter

Have your yearly goals handy.

- Perform a Q review - to the best you can
- Work through some of these questions for your Q review and debrief (you don't have to share this with us unless you want to).

1) What were your wins

2) What's working, what is not working?

3) What's feeling challenging or downright difficult right now?

4) What do you need to take responsibility for?

5) Who did you feel supported by?



6) Did you ask for help if needed?

7) What was a highlight from last quarter?

8) Did you meet your goals? Financial or other?

9) What are you most excited about for next quarter?

10) Looking at your Yearly Goals are you staying focused/on track? What needs to shift (if anything) in those goals? Adjust if needed.

11) What were some surprise twists? Good and/or bad.
(Good to keep in mind the unplanned events that happened).

12) How much time off did you take last Q? Was that enough?

13) Write out any other insights and thoughts about the quarter ...



Why 90 Days?

3 months. 12 weeks. 90 days. It's not as much time as we think.

I've found that running my business on 90 Day Plans is the perfect way to stay laser-focused on priorities that move the needle *without getting bored or distracted - or squirrel brained with awesome creative ideas.*

Planning for next quarter.

How do you want to FEEL at the end of next quarter?

What do you want to accomplish or DO? (Brainstorm)

Theming our 90 days

Choose 90 Day Theme. A theme gives this 90-day sprint FOCUS. Deciding on a theme helps ensure your goals are working together. Choose a theme and display it where you see it every day!

- Visibility, store refresh, backend clean up, lean team, holiday plan fully in place, etc. Maybe it's Add a revenue stream etc. Level up - skills - or team or ? Let's brainstorm yours, inventory control, etc.
- What are some projects, outside of actual revenue activities that you would like to work on to help with your theme? What would you like to do, invest in, etc? (Get a new POS system, hire new employees, renovate an area, buy a new laptop, move my whole shop) etc.

Marketing strategies, revenue planning content recycling, event planning, your goals - you've got this!

Set-Top 5 90 Day Goals. Once you have a core focus, your revenue goals, promotional calendar, and your THEME - now it's time to set your 90-day sprint goals. These should align with your yearly goals... in fact, these goals are the perfect MILESTONE goals on your way to achieving a bigger goal.

Brainstorm Goal Action Steps. For each goal you've set, brain dump ALL the action steps you can think of to accomplish this goal. Do this with post-it notes, big colored lists etc, so I can easily map out steps (one color post-it or per goal) on a calendar and see what I really have the bandwidth for.

Create 30 | 60 | 90 Day Plan. Once you've mapped out all your action steps, your promotions, and your goals, you want to pull out a calendar and start figuring out how you're going to implement. There are only 12-13 weeks in a quarter.

Time OFF. Make sure you know days you want to take off, including school days off, vacation time, birthdays, holidays, etc!

Revenue. What is your goal revenue? What are you selling this month? What are the revenue streams broken down?

Attract Marketing. What are you doing this month/quarter to bring new people into your shop?

Engage Marketing. What are you doing this month to encourage and build relationships with people who find you?



Nurture Marketing. How are you getting existing customers to know, like and trust you, and stay on their radar?

Wow and Delight Marketing

Goals Check. What else do you need to do this month to achieve your top 5 goals?

Create monthly promotional plans.

- Use your monthly promotional calendars for a product, event, and big plans to help you and your team stay focused

We can work through all the above and move into promotional planning and content planning. Brainstorm, work and get this on paper and planned for you.

*** Your business goals should/could be shared with your team and partners so everyone knows where the bus is headed!

Years Top 5 Goals

A reminder of your big goals for the year that you set.

Goal 1:

Goal 2:

Goal 3:

Goal 4:

Goal 5:

My 90 Day Theme:

If you've struggled to stay focused for 90 days on achieving a goal, then choosing a core theme to focus on could be incredibly helpful. When you choose a THEME for each quarter, all of your



work aligns with your primary goals and you see an exponential return on your time and energy investment.

90 Day Goals: Top 5 (or more)

Once you have your core focus, you can set your 90-day sprint goals. These should align with your yearly main goals. These goals are the MILESTONES or Goal Post - we set to move forward in achieving our main goals.

Goal 1:

Goal 2:

Goal 3:

Goal 4:

Goal 5:

Some resources: <https://www.calendar-365.com/holidays/2022.html>



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Breakdown the 5 goals!

Goal 1 :

By When:

Who:

Action Steps:

Goal 2:

By When:

Who:

Action Steps:

Goal 3

By When:

Who:

Action Steps:



Goal 4:

By When:

Who:

Action Steps:

Goal 5:

By When:

Who:

Action Steps: