

THE SPEAKERFLOW

QUARTERLY PLANNING WORKBOOK

The Complete Planning &
Goal-Setting Guide

speakerflow.com

WELCOME! 🙌

Hello and welcome to your Quarterly Planning Workbook!

This workbook was created after thousands of hours of coaching time with expert business owners ranging from just-getting-started to 7-figure earners and hall-of-fame professional speakers. In it, you'll find the best of everything that we've learned. We hope that it serves you well when mapping out the immediate future of your business.

If you're unsure whether or not you need this workbook, those that benefit most from it are those looking for a structured process to review, ideate, decide on, commit to, and execute their goals for the next quarter.

Although it can be tempting to dismiss comparisons – of your business and goals to those of other expert business owners – you need to be brutally honest about where you're at, what you can realistically accomplish, and what you even want in the first place. You only need to compare yourself to past versions of yourself, but reflection is key if your goal is to further grow your business.

Another common temptation is to make decisions based on optimism when in "vision-crafting" mode. Avoiding this means committing to a realistic, yet still exciting vision for the future. Then, over-delivering, smashing your goals, and letting that momentum carry you to the above and beyond (or kicking your feet up and giving yourself permission to celebrate a job well done).

By using this workbook, our goal is to help you avoid these temptations and common mistakes and, instead, allow yourself to freely generate ideas and set goals for the upcoming quarter. Anything that doesn't make the cut can be kept around for future consideration.

We hope you find this helpful and would love to hear how we can support you in achieving your goals and realizing your vision. You've got this!

Best,

Taylora, Austin & the SpeakerFlow team

SEGUE

The segue is a time to reflect personally and professionally. It's meant to set the tone for the rest of the planning session and get your gears turning on what went well and what didn't. Think of the segue as the warm-up to the rest of the session.

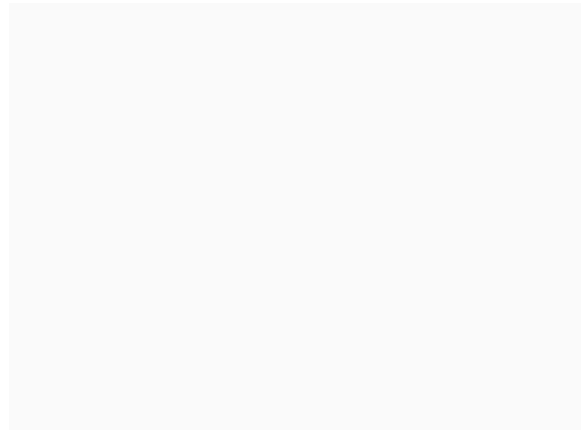
PREVIOUS YEAR'S HIGHLIGHTS

What were the key wins, lessons learned, and ideas from the last quarter?

Business Highlights



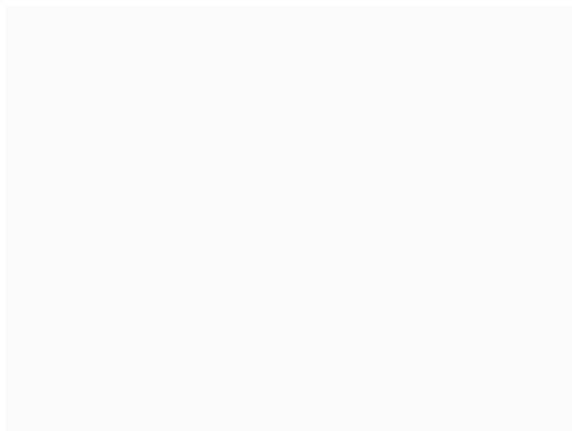
Personal Highlights



WHAT IS & ISN'T WORKING

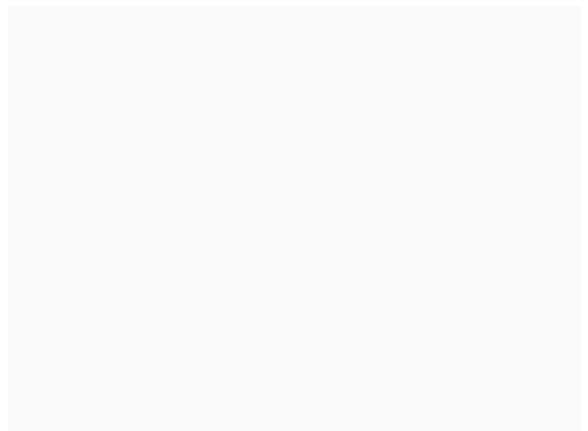
Is Working

(repeatable successes, positive feedback, clearly measurable results)



Isn't Working

(continual frustrations, time wasters, bottlenecks, etc.)



LAST QUARTER IN REVIEW

This section is meant to help you analyze how your quarter was against your goals. This is a place to capture lessons learned and help you improve next quarter's goal setting.

KPI'S (KEY PERFORMANCE INDICATORS)

Which numbers trended **positive** throughout the quarter?

Which numbers trended **negative** throughout the quarter?

Which numbers have I been tracking that aren't helpful?

Which numbers didn't I track that I should have tracked?

QUARTERLY OBJECTIVES

Which quarterly objectives did I **complete** this quarter?

Which quarterly objectives did I **fail to complete** this quarter?

What could be improved for next quarter?

Which quarterly objectives will carry over into next quarter?

VISION REVIEW

After the segue, the next step is to realign yourself with your big-picture vision for yourself. There are three major sections we want to look at: the 10-year, the 3-year, and the 1-year vision.

The **10-year vision** should be the pie-in-the-sky, incredibly exciting vision for the long-term future. It should be a balance between revenue, lifestyle, and activities you love to do.

The **3-year vision** is meant to help you get a little more granular. Think of the major milestones that you'll need to achieve in order to hit your 10-year goals.

The **1-year vision** is the most specific version of your vision planning and will be based on specific objectives you know you need to achieve by the end of the current year. It should include measurable goals that line you up to be on track for your 3-year vision.

When you reverse-engineer the long-term vision into the here and now, you'll be more able to make the little decisions that actually allow that vision to become reality.

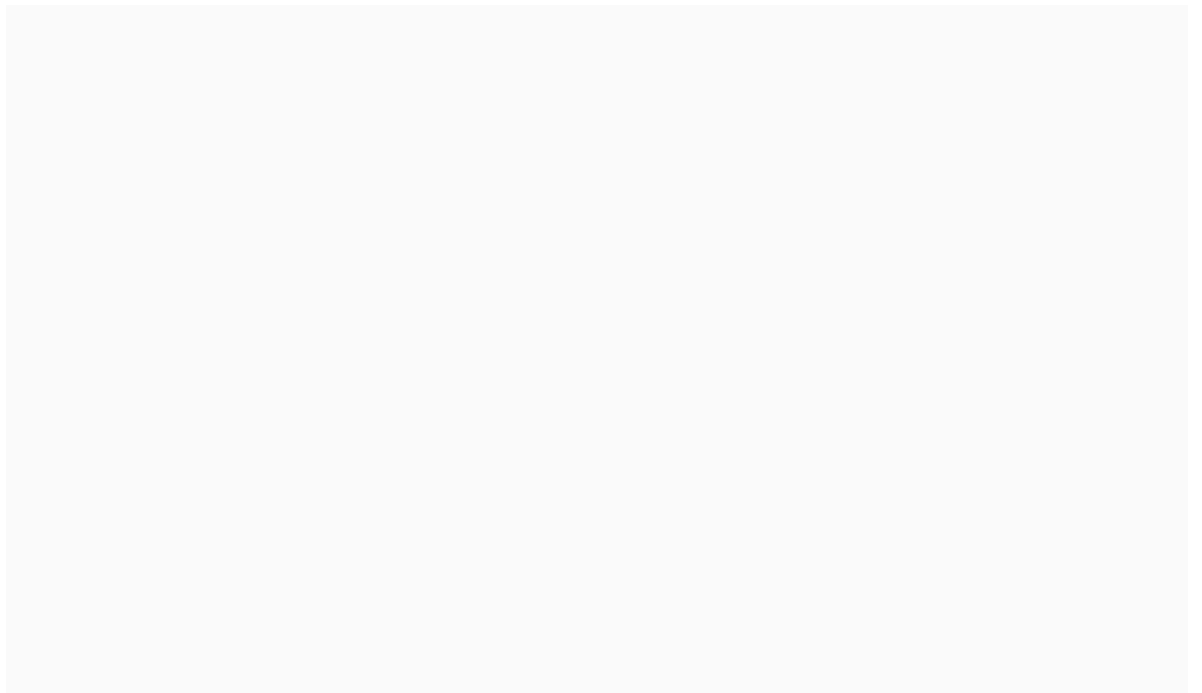
The reason we check in on this every quarter is that we need a moment to pause and reflect to ensure we're going to set ourselves up for the best possible quarter to be on track for all three of these vision layers.

YOUR 10-YEAR VISION

YOUR 3-YEAR VISION

A large, empty rectangular box with a light gray background, intended for writing a 3-year vision statement.

YOUR 1-YEAR VISION

A large, empty rectangular box with a light gray background, intended for writing a 1-year vision statement.

ISSUES

As you work through the above portions of this template, you'll likely spot areas of improvement, changes you need to make to your strategy, and hurdles to overcome as you take your next steps. All of these things should be added to this section.

Give yourself some time to consider the following:

- What is causing you the most pain in your business right now?
- Where are you wasting time, or otherwise not using it wisely?
- What are you doing that's taking you out of your flow state?
- What friction points are holding you back from getting things done?
- What do you **know** needs to get done over the next 90 days?
- What did you not get done last quarter that you want to consider this quarter?

Once you've put these issues you've identified into the list, rank the top five that would create the most impact if alleviated and make sure they're designated as "High Priority."

Issue	Priority	Proposed Solution
<i>No new outreach and inbound slowing down - How do we ramp things up?</i>	<i>High</i>	<i>96 Leads enrolled in SpeakerFlow's Watertight Sales process</i>

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Issue	Priority	Proposed Solution

NEXT QUARTER'S OBJECTIVES

From the list that you generated above, take the top five issues and drop them into the table below in the first column.

Then, in the next column, outline what you know needs to get done (or even any ideas you have right now) in order to resolve the issue and keep on track for your ultimate vision for your business.

You can have up to seven objectives per quarter. This leaves you room to add two additional objectives that may be passion or creative-related (provided you identified five points in the above exercise to be worked on).

Objective

What needs to get done?

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Objective

What needs to get done?

NEXT STEPS

- Do not let this time go to the wayside by not revisiting this document regularly (at least once a week). If you don't keep on top of it, you're almost guaranteed to get lost in the day-to-day of running your business, and these goals will fall to the wayside. We know – We've made that mistake, too.
- Take all of your objectives from the Next Quarter's Objectives section and make sure you're tracking them somewhere, If you're using SpeakerFlow's [KPI tracker](#), for example, put them there.
- If you have a business coach, ask them to review your quarterly goals and progress. It never hurts to get an outside perspective. Who knows? You might be missing an opportunity or solution right in front of you!

BONUS RESOURCE:

S.M.A.R.T. GOALS

You've likely heard about SMART Goals already as it's one of the most shared concepts around goal setting. If you haven't or if you just need a refresher, we figured we'd give you the breakdown. If your quarterly goals are "SMART," you'll have extremely actionable next steps and will be well on your way to achieving success!

S - SPECIFIC

Simply put, your goals need to be clear, concise, and provide you with a well-defined end result that will give you a sense of direction and help you create high-impact next steps. If you simply set a goal to improve website traffic, it won't give you enough guidance to stay motivated or recognize when you've reached your objective. Instead, you need to ask yourself the following questions:

- What do I want to achieve?
- Who is involved in the process?
- What are the possible challenges and my limitations?
- How am I going to achieve this?
- To set SMART objectives you might consider some of the following verbs to use; acquire, create, complete, drive, improve, produce, standardize, upgrade. To find more access this useful list of action verbs for SMART goals.

M - MEASURABLE

Set a time, distance or other way to track your progress. Establish how you will measure your goal and your progress. Many people find that writing things down helps to put an idea or a goal into action. One way to measure your progress is to track your goal on a calendar. For exercise, you can place an "X" on each day of the week you meet your goal. Then write down in as much detail as you can how much you did and how long it took. From there, you can continue to build on the goal, whether in frequency, duration, intensity or all of the above.

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A - ASSIGNABLE

To ensure you are setting a goal that is assignable, it is important to develop the necessary attitude and determination that you can do this. Remember to set yourself up for success. Build an environment around yourself to ensure you meet your goals. How can you prioritize this goal? Is this goal something that can be realized now or in the future?

Remember also to specify who is responsible for tracking and completing this goal if there is more than one person on your team. For example, on our own team, our sales team lead has his own set of goals as does our content manager. It's important to delegate within your own team, too. After all, it's cheesy but the saying "teamwork makes the dream work" is totally true.

R - RELEVANT

Relevance refers to focusing on something that makes sense with the broader business goals. For example, if the goal is to launch a new program or service, it should be something that's in alignment with the overall business/department objectives.

T - TIME-BOUND

Setting goals on a timeline is extremely important. Not only will you have a better chance of successfully hitting your goals since you'll have bite-sized action steps that will help you hit your goal, but you'll be less likely to make excuses. If you set a goal to generate \$350,000 this year from speaking and don't break that up with milestones, before you know it you'll be in October with \$120,000 closed, leaving you no chance to hit that final \$230,000. Instead, Break that up into four or twelve benchmarks. We can say \$30,000/month. If you follow and track that timeline, then you'll know along the way if you're ahead or behind, and can adjust your daily activities accordingly.

Long story short, the idea is that by setting your goals on a timeline and use milestones, you'll be more able to track progress and adjust your efforts depending on your success.

Questions or Comments?

Contact us at
hello@speakerflow.com
and let us know what you
think!

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