



Date \_\_\_\_\_

### **QUARTERLY CHECK-IN WORKSHEET**

**INSTRUCTIONS:** At the end of each quarter, it's a great idea to pause and take stock of how things went in both your business and life. This allows you to appreciate what's working and make changes so your business and your life keep moving in the direction you want. Please complete the questions below and then identify the key actions that you want to take to make this next quarter a great one!

#### **TAKE STOCK: Of Where You Are and Where You Want to Go**

<b><u>Financials</u></b>	<b>Qtr. Results</b>	<b>Qtr. Goals</b>	<b>Year to Date Results</b>	<b>Next Qtr. Goals?</b>
Revenue				
Gross profit				
Gross profit %				
Net Profit				
Net Profit %				
Other Goals_____				
Other Goals_____				
Other Goals_____				

If you were sitting here three months from now, at the end of this quarter, and it had been a fabulous quarter, what would have to happen (What did you do? What did you accomplish?) for you to feel amazingly proud of your progress? Don't be afraid to dream a little bit. Make your vision for the quarter thrilling enough that you will really feel compelled to go for it. Write your answers below.

## EVALUATE

1. Overall, how do you think this last quarter was in your business? Why?
2. What are the top three (or 4 or 5) wins or successes of last quarter that you want to celebrate? What other positive things happened?
3. Think about your financial results...sales, gross profits, net profits...your team, yourself. Are there any areas that stand out as clearly needing improvement? Which Areas? What needs attention?

4. Now let's drill down a bit and look at positives and areas needing improvement in different areas of your business listed below. Write down as many as come to mind. Remember, the idea here is to come up with as many as you can think of. Don't edit yet.

**SALES**

**What Was Positive?**

**Areas Needing Improvement?**

**PROFIT**

**What Was Positive?**

**Areas Needing Improvement?**

**TEAM**

**What Was Positive?**

**Areas Needing Improvement?**

**YOU**

**What Was Positive?**

**Areas Needing Improvement?**

**OTHER AREAS OF YOUR BUSINESS**

**What Was Positive?**

**Areas Needing Improvement?**

5. What are the things in your business that you know you need to do but didn't get around to?

6. What barriers do you see to reaching your next quarter goals?

## **YOUR LIFE**

1. Overall, how was this last quarter in your life? What stands out? What do you have to celebrate? What would you change? What did you learn?

Satisfaction with your life

**Rating (1-10)**

**What Was Positive?**

**What will you Change?**

☐ Family

☐ Friends

☐ Relationship

☐ Fun & Recreation

☐ Health

☐ Money

☐ Personal Growth

☐ Physical Environment

☐ Other\_\_\_\_\_

## **KEY PRIORITIES FOR THE NEXT QUARTER**

1. What worked that you will keep doing?

- What are the priority areas to focus on that will make the greatest difference this next quarter?

### **BUSINESS**

1.

2.

3.

4.

5.

### **LIFE**

1.

2.

3.

4.

5.

2. What will you say no to and completely stop doing to make enough time for your key priorities?

### **BUSINESS**

1.

2.

3.

4.

5.

### **LIFE**

1.

2.

3.

4.

5.