

# QUARTERLY REFLECTION

## QUARTERLY GOALS SELF ASSESSMENT

Completed

If not complete,  
% complete?

GOAL #1

Y  N

\_\_\_\_\_ %

GOAL #2

Y  N

\_\_\_\_\_ %

GOAL #3

Y  N

\_\_\_\_\_ %

PERSONAL FOUNDATION

Y  N

\_\_\_\_\_ %

KNOWING WHAT YOU KNOW NOW, IS THERE ANYTHING YOU WOULD DO DIFFERENTLY?

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RE-READ YOUR 3-MONTH VISION STATEMENT. BASED ON WHERE YOU STARTED,  
HOW DO YOU FEEL YOUR QUARTER WENT?

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WHAT IS 1 **ADJUSTMENT** YOU WOULD LIKE TO MAKE TO YOUR SCHEDULE IN THE NEXT QUARTER?

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WHAT ARE YOU **GRATEFUL** FOR THIS QUARTER?

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NOTES

# QUARTER GOALS

## STEP 1. REVISIT YOUR VISION

## STEP 2. SET YOUR GOALS

*Pro-tip: Break down your 1-Year goals into bite-size pieces. You don't have to work on every goal every quarter. We recommend no more than 3 goals per quarter.*

## STEP 3. DEFINE YOUR STRATEGY

*Make sure to create a strategy for each quarterly goal, just like you did your 1-year goals.*

## STEP 4. CREATE YOUR PERSONAL FOUNDATION

### GOAL #1

#### Strategy

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### GOAL #2

#### Strategy

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### GOAL #3

#### Strategy

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### PERSONAL FOUNDATION

- |                       |                       |
|-----------------------|-----------------------|
| <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | <input type="radio"/> |

**3-MONTH VISION STATEMENT:** Imagine that it is 3 months from now, you have completed all of your quarterly goals and kept to your personal foundation. How are you feeling, where are you at, how have things changed?