



2025

QUARTERLY & YEARLY
PLANNING WORKBOOK

YEARLY OVERVIEW

What are your top 3 goals in these categories?

REVENUE

IMPACT

PERSONAL GROWTH

Quarterly Themes

What is the primary focus for each quarter? Example: Audience growth, new service launch, or system optimization.

Q1

Q2

Q3

Q4



2025 YEARLY PLANNER

Mark key dates: launches, vacations, conferences, and deadlines.

January	February	March
April	May	June
July	August	September
October	November	December

QUARTERLY PLANNING

What are your top 1-3 goals for the quarter? Why does it matter. Metrics to track.

January

February

March

Quarter 1 Actions Needed

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April

May

June

Quarter 2 Actions Needed

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QUARTERLY PLANNER

July

August

September

Quarter 3 Actions Needed

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October

November

December

Quarter 4 Actions Needed

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Q1 REVIEW

WHAT WENT WELL THIS QUARTER? WHAT DIDN'T GO AS PLANNED?

WHAT DID YOU LEARN THAT CAN GUIDE THE NEXT QUARTER?

WHAT IS ONE THING YOU'LL DO DIFFERENTLY?

KEY PERFORMANCE INDICATORS (KPI'S)

REVENUE:

NEW SUBSCRIBERS ON EMAIL LIST;

NEW CLIENTS:

CONVERSION RATE % (LEADS CONVERTED INTO PAYING CLIENTS ÷ TOTAL LEADS):