

Monthly Check-in & Planning

“If you go to work on your goals, your goals will go to work on you.

If you go to work on your plan, your plan will go to work on you.

Whatever good things we build end up building us.”

-Jim Rohn

The POKR framework is important because we - as humans - need to be able to understand our higher level goals and our purpose clearly, and be able to see progress towards them. This consistent progress - however small - can motivate us, help us build confidence in our abilities, and make us feel empowered!

This worksheet is meant to be the glue that holds your goal-setting and your goal-execution together and to keep you honest in making progress every single month.

It is designed to help you reflect on the past month and plan ahead for the coming month. This should be completed on or near the end or beginning of every month and submitted to me for accountability and review.

Pages 2 and 3 are reflection prompts for last month. Page 4 helps you think through your goals and metrics for the coming month. Just in case you need extra copies, I've included the previously shared Action Plan and OKR worksheets on Pages 5 and 6.

What this reflection is NOT meant to do is to make you feel shame or guilt. It's easy to fall into the trap of looking at what you did or didn't do and start to gauge your worthiness or capabilities because of it. This may be an entirely a new framework and way of being for you, and it takes time to build a new habit. Over time, you will begin to better forecast the amount of work you can get done **realistically** while also juggling everything else you may have going on! Your goal is to move from an always “busy” hustle, to a healthy hustle fueled by intention.

Behavior change takes time, and your daily actions will move the needle in creating your purpose. This check-in will help you gauge your past progress and identify how things need to shift in the future. Before you begin, take a deep breath and relax! Approach this as a helpful exercise that will teach you more about yourself and guide you to become more intentional, more mindful, and more purposeful!

[Submit your reflection »](#)

-Quinn Tempest



1. How did last month go?

Keeping your quarterly POKRs and monthly action plan in mind, use the space below to reflect on how things went last month. This is open-ended prompt so you can free-flow, but here are a few questions to inspire you:

- What did I achieve last month?
- What are the big wins I can celebrate?
- What challenges did I face?
- What didn't go as planned?
- What do I want to improve on?
- What did I measure?

Last month was when life totally changed! I can't believe we went from barely knowing about coronavirus at the beginning of the month to having our whole life turned upside down.

A lot of my time and energy in March went towards the current crisis. For a week or two, it really consumed me. The main impact has been to my 6 speaking engagements that were postponed and that I likely won't be doing at all. At first, I welcomed the slower pace, but I'm also realistic that missing out on those make me lose out on lots of possible biz opportunities. So I'm doubling down moving forward on recommitting to my vision for my business, regardless of what's going on, and working to pull the fundamental pieces together.

I don't have distractions or commitments right now, so I want to take advantage of it... mindfully of course, because even if I'm stuck at home, my internal motor driving me to do do do is still there!

Looking back on last month's review, I did complete most everything I set out to accomplish. The things I didn't were just because I couldn't with everything going on.

The one thing I didn't accomplish that wasn't impacted was my plan to launch my IG post templates for sale. I even declared it every week on the monday post in the group, and I just couldn't make it happen between Collective events, finishing up a huge client deliverable, and Corona-craziness. But I just revisited it and am even more excited to release it soon!

An understanding came to me at the end of the month that I don't really want to take on a lot of client work in the coming months. It takes up so much time and attention and I'm ready to prioritize MY ideas. So if that means taking a hit financially, well maybe I just need to do it. I'm ready to really move forward with my goals and ideas for the month and kind of looking forward to a) doing it and b) having to stay at home to do so.

I know that creativity comes from constraints and I'm ready and willing to be constrained and DO THE WORK on MY ideas this month!!

Use the line above to write a big ol' happy affirmation for yourself!! You've done some serious WORK over the past month, and this is your chance to celebrate! (e.g. "I am a badass." "I am committed, dedicated, and making progress!") Whatever you feel, throw yourself a party and celebrate!!



2. What do you need to begin, end, and sustain?

Perform a retrospective for your last month within this three-part framework. You can of course focus on tactical action items that support your objectives, but also make sure to consider elements like mindset, energy management, and self-care.

Begin.

What do I need to START doing to achieve my objectives and create my purpose?

A return to content batching! This will help me remain consistent and raise the value of my content.

Creative strength training without weights!!

Re-focusing on my ultimate direction for my biz.

Actually exploring daily or weekly affirmations.

End.

What do I need to STOP doing that is holding me back from creating my purpose?

Flipping through my phone at night instead of reading until I fall asleep.

Making excuses for my meditation since Ryan is home.

Being hard on myself for not knowing the right thing to say or do in the current crisis.

Sustain.

What do I need to CONTINUE doing that helps me create my purpose?

Keep up valuable email content on a weekly basis

Experimenting with new ways to connect with people e.g. mindful virtual co-working

Yoga flow 2x a week with Jenn or apps

Date nights with the hubz at home.

Listening to podcasts while I tidy or do things. Makes me happy!



3. What will I focus on doing in the coming month?

List out your major initiatives and action items for the coming month that will support your objectives. If you've built your action plan in a certain tool or planner, make sure to revisit it there and update. Use the action plan template on page 5 if you need it.

Collective: Running the Academy and supportive my Collective members
Create and start implementing plan for new CYPC enrollment period

Courses/Evergreen: Launch Instagram post template product campaign!

Services: Book 1-2 client projects for Q2

Marketing: Return to batching my content by using 'batching days' as a test
Analyze and tweak my Purpose Quiz follow-up series
Re-launch Purpose Quiz
Update my design portfolio

Press: Take Mic Drop Workshop and draft a speaking plan
Craft Signature Talk abstracts
Pitch myself for podcasts
Create talk and present at Bright Side conference!



4. What will I measure in the coming month?

List the metrics you need to track in the coming month to show that you are making progress to your desired results. It could be as simple as going to 1 yoga class a week or a detailed marketing KPI. You can't improve what you don't track, so be specific here.

1 Collective enrollment period plan outlined
1 Instagram post template product campaign launch
1 client project booked for Q2
2 yoga classes a week / 2 runs a week / at least 1 strength training a week
2 content batching days
1 updated email sequence for Purpose Quiz
3 new portfolio items on my website
1 completed Mic Drop course and 1 speaking plan outlined
3 Signature Talk abstracts created
10 podcasts pitched
1 talk delivered for Bright Side Conference



My Action Plan

Name of Month

Week One

Week Two

Week Three

Week Four

1. Objective

In one sentence, list one primary objective that will help you create your purpose. This statement should help inspire you and set your direction. It should not be measurable. Use the "Why" box to clarify the motivation behind this objective.

Why?

2. Key Results

Specify the key result(s) that will help you measure progress toward achieving your objective. These should be measurable and realistic.

3. Initiatives

List some major things you need to do in order to drive progress on your Key Results.