

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?

I burnt out hard around January 20th. It honestly just hit me. I thought I had done all the "right things" to curb the overwhelm, but it just happened. So many things fell into my schedule at one: a huge keynote speech, coordinating photoshoots, re-writing AND re-filming all the Collective video lessons, and a big client project.

It was rough, and PMS didn't help me any. I think the biggest lesson I took from it was that burn-out and overwhelm isn't a lesson I just had to learn once. It's one I have to unlearn and re-learn again and again. The biggest difference this time was that I didn't let it drag me down and deter me for days or weeks (or even months!) on end. There was more breathing room between the moment and my identity. This was HUGE.

I'm thankful for - even amidst the chaos - keeping up with as many of my rituals as I could, including yoga, OTF, meditation. While I didn't attend to them as much as normal, I didn't let them slip completely. I'm proud of this growth.

In terms of focus, I was almost 100% dedicated to pulling all the elements of the new CYPC enrollment period together. I'm REALLY proud of all the work I've done. This feels like I birthed a child AGAIN and it feels so elevated and professional. I'm happy that I've iterated, tested things, listened to feedback and incrementally made it better.

I sometimes (often) struggle with perfectionism and can magically find the things I need to do BETTER vs focusing on what I already did WELL. I'm working on this! I think writing affirmations like my "keynote pep talk notes" could be a powerful practice to integrate more and more into my day.

When it comes to measurement, this is what I DID and DID NOT complete:

- * I filmed all new videos for the Collective and took new photos!
- * I did not 100% flesh out the course platform just because the videos will be ready later, but the skeleton is there!
- * I already have 5 applications in. My goal is 30 or more!
- * I have utterly failed at not working on the weekend. But I have been able to cut it down to just a few hours and that's mainly leading up to the launch. I really have enjoyed a few Saturdays completely "off."
- * I did successfully complete my big client deck and will be presenting it tomorrow!!

I worked hard and now, I let go of expectation of results. I'm proud of what I've accomplished!

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?

- * Exploring daily / weekly intentions or affirmations
- * Getting back to longer morning meditation routine
- * NO work on weekend whatsoever
- * Testing out end-of-day rituals
- * Handing off even more tasks to Dakota when possible
- * Getting back on track with social media planning and blogging
- * Sharing more of my client work with Collective / followers
- * Thinking seriously and planning for our Summer 2020 trip!!!

End.

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

- * Pushing tasks back a day or two
- * Overloading myself with too many to-do's in one day
- * Not taking a full day off in the week
- * Undervaluing the true work I have done and the progress I've made
- * Letting rough emotions or moments shake my sense of self-worth
- * Adding unnecessary layers of expectation to social media/email

Sustain.

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

- * Writing more from the heart with REAL postcard emails
- * Weekly yoga and Orangetheory
- * Closing down my computer on weekends / nights
- * Being supportive and open to my husband's travel/home ideas
- * Reaching out to girlfriends, doing more FUN activities!
- * READING!
- * More regular weekly planning on Mondays (or late Sundays)
- * Saying no to small projects from old clients



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.

- * Filling up the Collective with new amazing humans!!!!
- * Finalizing the Teachable site for the CYP Academy
- * Strategy Delivery #2 for Storytellers Project
- * Kicking off Branding + Web projects for Natalie & Kim!
- * Finalizing a beautiful travel journal for Lauren
- * Completing a content plan through March/April
- * Launching McKinley open space campaign
- * Outline deck for 2020 Digital Summits
- * Return to planning for PR & Speaking pitches (near EOM)



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.

- * 5 client projects / elements delivered for Lauren, Kira, Natalie, TSP, McKinley
- * 1 outline for Digital Summits 2020 presentations
- * Inviting minimum 30 new members into the Collective
- * 4 Tip Tuesdays outlined and created IN ADVANCE
- * 1 fully set-up Teachable platform for the CYP Academy
- * 3-4 fitness or yoga classes attended a week
- * Minimum 4 blogs planned and scheduled through spring



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.