

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?

Ohhhh last month! Where do I begin? It was one of the most challenging months in my business ever. It was emotional, it was draining, it was exciting, and it was a huge learning lesson.

The biggest challenge I faced came from opening up more spots in the CYP Collective. Really, it was my first bigger "launch," since for the beta round, I kept the network and invitations small. My goal was to get 30 new members into the group. Pretty quickly, I knew that wasn't going to happen based on the general energy and momentum of the first few days.

I really fell back into strong emotions because to be honest, I never expected less. I had logical reasons to believe this goal was easily achievable, but I also never sat down to sketch out other scenarios. As privileged as it may sound, I've never "failed" this much in my biz but I've also NEVER done something like this, nor taken a swing so big.

Now, all that being said, I don't count this as a failure at all although my emotions were up and down. Because the QUALITY of the women joining our community has *blown me away*! Plus, I've seen the transformations - both big and small - from my founding members and I'm more excited than ever. I'm seeing the power and potential of what this community can become, and I'm more excited than ever.

The lessons I learned are:

- * My efforts resulted in amazing quality members. Now, I just need to work on quantity!
- * Hope for the best yet plan for other realities that are 100% possible so I'm not so sidelined.
- * Don't take it personally. (Or take it personally for a second, and quickly move on!)
- * I could use help on setting up a 'launch' in a more effective way.
- * It's okay to talk about work with friends. They can provide such great support.

In terms of other accomplishments, I was able to fully set-up the new Teachable course platform. I'm so happy with it so far! It makes The Academy that much more seamless of an experience and more intuitive for members to go through. It was a LOT of work, but I'm happy that it is set-up and will work for a long time to come.

Because the launch and Academy set-up were my priorities, I didn't end up prioritizing some things I had put on my last monthly review. I've already begun to revisit them and excited to get back to content planning along with ideas I have to grow my biz (speaking, PR, etc).

Failure isn't failing. I am stronger, more knowledgable, and more resilient!

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?

Getting back on track with social media planning and blogging

Trying something fun and new with selling IG post templates!

Exploring daily / weekly affirmations and intentions

Book Summer trip! But figure out coronavirus issues first

Re-igniting morning meditation

Do a handicraft! Try my embroidery kit out

Reaching out and meeting with people I said I'd connect with in 2019

Have more fun with Instagram content!

Daily mini tidies

End.

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

Sneaking into my "Inbox Pause" folder on mobile!

Overthinking all my friend interactions

Having to have everything planned super in advance

Sustain.

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

Manageable amount of daily tasks in Asana

Time blocking when I feel I need more structure

Weekly yoga and OTF

Being a bright, open "responder" to my hubz and people in life

READING!

Planning all Collective content + events in advance and leaning on DS

Legitimate 45m or 1h lunch breaks

Listening to podcasts while I clean or walk places or make lunch



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.

Running the Academy! Being present for my Collective members.
Strategy #3 Deliverable for The Storytellers Project
Finalize Kim's Logo + Make Progress on Natalie's website!
Book Q2 client work by following up with leads.
Creating a content plan for end of Q1 + Q2.
Finalize deck for new IG Story talk and deliver it!
Finalizing IG post templates and creating a mini campaign to sell them
Researching more on Azores for our summer trip
Celebrating my anniversary and enjoying time with my hubs!



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 completed strategy deliverable for The Storytellers Project
2 (min) new client projects booked for Q2
1 completed IG post template campaign strategy!
1 completed deck for new IG Story talk
4 Tip Tuesdays outline and created in advance
3-4 yoga or fitness classes per week
4 (min) blogs planned for 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.