

GOALS & GROWTH SERIES

Quarterly Business Goal Planner

Turn big ambitions into a focused 90-day plan — with goal worksheets, weekly milestones, habit trackers, and review pages that keep you on course.



BUILT FOR

Solo founders

Online sellers

Makers & creators

Service businesses

Side hustles

Growing teams



START HERE

Welcome

Annual goals are easy to set and easy to forget. A year is too long to stay focused — by March, January's resolutions are a distant memory. **Ninety days is the sweet spot.** It is long enough to achieve something real, and short enough to keep your attention every single week.

This planner gives you a complete quarterly system: set a clear vision, choose a few meaningful goals, break them into weekly milestones and daily habits, then review your progress so nothing slips. Work it once and you will never drift through a quarter again.

The quarterly advantage

- **Focus** — a few goals for 90 days beats a long list for a vague "someday."
- **Urgency** — a deadline you can see keeps you moving.
- **Momentum** — weekly milestones turn big goals into doable steps.
- **Course-correction** — regular reviews catch problems while you can still fix them.

Use this planner at the start of each quarter. Spend an hour setting your vision, goals, and 90-day map. Then check your weekly milestones and habits each week, run the monthly and mid-quarter reviews, and finish with a reflection that feeds straight into next quarter.

▶ TIP

Choose no more than **three** big goals per quarter. Focus is a superpower — three goals you actually achieve will move your business further than ten you only start.



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GETTING STARTED

How Quarterly Planning Works

Before you set goals, here is the simple system this planner runs on. It works for any business — the key is to repeat the cycle every 90 days.

- 1 Set your vision & priorities**
 Decide what matters most this quarter — your theme and top 3 goals.
- 2 Define your goals**
 Make them specific for revenue, marketing, and product.
- 3 Map the 90 days**
 Break goals into monthly themes and weekly milestones.
- 4 Build supporting habits**
 Choose the daily actions that drive your goals.
- 5 Review regularly**
 Check progress monthly and reset at mid-quarter.
- 6 Reflect & plan again**
 Learn from the quarter and roll into the next.

◆ THE SMART GOAL FORMULA

Make goals **SMART** so they are actually trackable:

LETTER	MEANS	WEAK GOAL → STRONG GOAL
S · Specific	Clear, not vague	"Grow" → "Grow email list"
M · Measurable	Has a number	"More subscribers" → "+800"
A · Achievable	Realistic	Stretch, but possible
R · Relevant	Matters to the goal	Tied to revenue
T · Time-bound	Has a deadline	"Someday" → "by quarter end"

▶ TIP

A goal without a number is just a wish. Every goal in this planner should answer two questions: how much, and by when. That is what makes progress something you can actually see.

01

SET YOUR GOALS

Vision & Priorities

Start with the big picture. Before the numbers and tasks, get clear on where you are headed and what matters most this quarter. Everything else flows from here.

→ HOW TO USE THIS PAGE

Write your longer-term vision in one line, choose a single word or theme for the quarter, then pick your **top 3 priorities** — the goals that would make this quarter a win. Note why each one matters now.

EXAMPLE — MAPLE & CO.

Maple & Co.'s quarter: Vision — "become the go-to cozy home brand for small spaces." Theme word: *Focus*.

Top 3 priorities: (1) grow revenue 25% to \$30k, (2) build the email list past 3,000, (3) launch the autumn product line.

MY VISION (WHERE I'M HEADED)

MY WORD / THEME FOR THE QUARTER

QUARTER (E.G. Q3) & YEAR

MY TOP 3 PRIORITIES

#	PRIORITY GOAL	WHY IT MATTERS NOW
1		
2		
3		

▶ TIP

If everything is a priority, nothing is. When a new idea appears mid-quarter, ask: does this serve one of my three priorities? If not, it waits until next quarter.

02

SET YOUR GOALS

Quarterly Revenue Goals

Put a clear number on the quarter. Set your revenue target, then break it down by month and by source so it feels achievable — and so you know what has to happen each month to hit it.

EXAMPLE — MAPLE & CO.

BREAKDOWN	TARGET	WHAT NEEDS TO HAPPEN
Month 1	\$9,000	Steady sales + email push
Month 2	\$10,000	Autumn line pre-orders
Month 3	\$11,000	Full launch + holiday lead-in
Quarter total	\$30,000	+25% vs last quarter (\$24k)

◆ **SETTING THE TARGET**

A **10–25% quarter-over-quarter** growth target is ambitious but realistic for most small businesses. Setting a number you have to *plan* for — not just hope for — is what makes it happen.

YOUR REVENUE PLAN

BREAKDOWN	TARGET	WHAT NEEDS TO HAPPEN
Month 1		
Month 2		
Month 3		
Quarter total		

Revenue by Source (optional)

SOURCE / CHANNEL	TARGET	LAST QUARTER

▶ **TIP**

Work backwards from your target. \$30,000 over a quarter is about \$2,300 a week. Breaking a big number into a weekly figure makes it far less intimidating — and easy to track.

03

SET YOUR GOALS

Marketing Goals

Marketing fuels revenue. Set goals for the activities that bring in and warm up customers — audience growth, content, and reach — each with a number and a key action.

EXAMPLE — MAPLE & CO.

MARKETING GOAL	METRIC	TARGET	KEY ACTION
Grow email list	Subscribers	2,400 → 3,200	Add a freebie opt-in
Grow Instagram	Followers	8,000 → 9,500	3 Reels / week
Stay consistent	Posts published	36 this quarter	Batch monthly
Drive traffic	Store visits	+30%	Pinterest SEO

YOUR MARKETING GOALS

MARKETING GOAL	METRIC	TARGET	KEY ACTION

REFLECTION QUESTIONS

Which marketing goal will have the biggest impact on your revenue target — and is it getting enough of your focus?

TIP

Tie each marketing goal back to revenue. Growing your email list matters because email drives sales — keep the connection clear so marketing never becomes busywork.

04

SET YOUR GOALS

Product Development Goals

Plan what you will create or improve this quarter. New and better products keep customers coming back — but only if the work actually gets finished, so give each project a deadline.

EXAMPLE — MAPLE & CO.

PROJECT	GOAL / OUTCOME	BY WHEN	STATUS
Autumn candle line	Launch 4 new scents	Month 2	Planned
Best-seller packaging	Refresh & add inserts	Month 1	In progress
Gift bundles	Create 2 bundle sets	Month 3	Planned

YOUR PRODUCT GOALS

PROJECT	GOAL / OUTCOME	BY WHEN	STATUS

REFLECTION QUESTIONS

Which product project most directly supports your revenue goal — and what is the very first step to start it?

TIP

Match product launches to your calendar. Releasing the autumn line in Month 2 gives it time to gain reviews and momentum before the busy holiday season — timing is part of the goal.



YOUR PLAN

Your 90-Day Goal Map

This is your quarter on a single page. Pull your theme, priorities, and key targets together here so your whole plan is visible at a glance. Pin it where you will see it daily.

QUARTER THEME / WORD

Top 3 Priorities

<p>PRIORITY 1</p> <hr/> <hr/>	<p>PRIORITY 2</p> <hr/> <hr/>	<p>PRIORITY 3</p> <hr/> <hr/>
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Key Targets

<p>REVENUE GOAL</p> <hr/>	<p>MARKETING GOAL</p> <hr/>	<p>PRODUCT GOAL</p> <hr/>
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How I'll Know I Succeeded

▶ TIP

Make your goal map visible. Print it and put it on your desk or wall. Goals you see every day get worked on; goals filed away in a notebook get forgotten.

05

WORK THE PLAN

Weekly Milestone Planning — Quarter Roadmap

Big goals get done one month and one week at a time. First give each of the quarter's three months a theme and 2-3 key milestones — the major checkpoints that move your goals forward.

→ HOW TO USE THIS PAGE

Assign each month a focus, then list the key milestones that must be hit that month to stay on track for your quarterly goals. Think outcomes ("autumn line live"), not tiny tasks.

EXAMPLE — MAPLE & CO.

MONTH	THEME	KEY MILESTONES
Month 1	Build the base	Launch email opt-in · refresh packaging
Month 2	Create & tease	Finish autumn line · open pre-orders
Month 3	Launch & push	Full launch · holiday lead-in · hit \$30k

YOUR QUARTER ROADMAP

MONTH	THEME / FOCUS	KEY MILESTONES
Month 1		
Month 2		
Month 3		

🔪 REFLECTION QUESTIONS

Looking at all three months, is your workload realistic — or is one month overloaded? What could you shift?

▶ TIP

Front-load the foundational work. Setup tasks (opt-ins, systems, packaging) in Month 1 make Months 2 and 3 far smoother — do the unglamorous groundwork early.

05

WORK THE PLAN

Weekly Milestone Planning — 13-Week Tracker

This is the engine of the quarter. Give every one of the 13 weeks a clear focus or milestone. Each Monday, glance here to know exactly what this week is for.

EXAMPLE — MAPLE & CO.

Week 1 — Set up email opt-in & freebie. **Week 5** — Finalize autumn scents & photos. **Week 9** — Open pre-orders. **Week 13** — Final holiday push + quarter review.

YOUR 13-WEEK PLAN

WEEK	THIS WEEK'S FOCUS / MILESTONE	DONE
Week 1		
Week 2		
Week 3		
Week 4		
Week 5		
Week 6		
Week 7		
Week 8		
Week 9		
Week 10		
Week 11		
Week 12		
Week 13		

▶ TIP

Aim for one meaningful milestone per week, not ten tasks. Thirteen real milestones, hit in a row, is exactly how a 90-day goal gets achieved.

06 WORK THE PLAN Habit Tracking

Goals are reached through daily habits. Choose the few repeated actions that drive your goals, then check off each day you do them. Print one grid per month of the quarter.

EXAMPLE — MAPLE & CO.

Maple & Co.'s daily business habits:

- Post 1 piece of content
- Reply to comments / DMs
- Ship orders same day
- 90 min deep work
- Check key numbers

MONTHLY HABIT TRACKER — MARK EACH DAY YOU DO IT

MONTH

HABIT GOAL (E.G. 5 DAYS/WEEK)

HABIT	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31

◆ HABITS OVER OUTCOMES

Track **process habits** (actions you control, like "post content") rather than outcomes (like "get 10 sales"). Show up for the habit and the outcomes follow. Aim for consistency, not perfection — missing one day is fine; missing two in a row is the danger zone.

▶ TIP

Anchor a new habit to one you already have: "after my morning coffee, I post content." Stacking habits onto existing routines makes them far easier to stick.

07

REVIEW & REFLECT

Progress Reviews — Monthly Check-In

Once a month, pause and check your progress against the plan. A quick, honest review keeps small slips from becoming a lost quarter. Print one for each month.

→ **HOW TO USE THIS PAGE**

Record where each goal stands versus its target, mark whether you are ahead, on track, or behind, and decide one adjustment for the month ahead. Keep it to 15 minutes.

EXAMPLE — MAPLE & CO.

GOAL	TARGET (TO DATE)	ACTUAL	STATUS
Revenue	\$9,000	\$9,400	Ahead
Email list	2,700	2,610	Behind
Autumn line	Designed	On track	On track

Month 1: revenue ahead, but the email list lagged. Adjustment — add the opt-in freebie that slipped, and promote it harder in Month 2.

YOUR MONTHLY CHECK-IN

GOAL	TARGET (TO DATE)	ACTUAL	STATUS

REFLECTION QUESTIONS

What went well this month, and what fell behind?

What is the ONE adjustment you will make for next month?

▶ **TIP**

Be honest in your reviews — this page is for you, not for show. A goal that is behind is not a failure; it is simply information telling you where to put your energy next.

07

REVIEW & REFLECT

Progress Reviews — Mid-Quarter Reset

Around week 6–7, take a bigger pause. The mid-quarter reset is your chance to recommit, drop what is not working, and refocus on what will actually move the needle in the second half.

Where Each Priority Stands

TOP PRIORITY	AHEAD / ON TRACK / BEHIND	WHAT IT NEEDS TO FINISH
1		
2		
3		

REFLECTION QUESTIONS

What is working well that you should double down on for the rest of the quarter?

REFLECTION QUESTIONS

What is not working — and are you willing to drop it or change the approach?

RECOMMIT

If you could only finish ONE priority by quarter-end, which would it be? Protect the time for it.

TIP

Mid-quarter is the moment most plans quietly die. A deliberate reset — cutting one thing, recommitting to another — is what separates the quarters you finish from the ones that drift.

08

REVIEW & REFLECT

Quarterly Reflection

The quarter is done — now learn from it. Compare your results to your goals, celebrate the wins, and capture the lessons. This reflection is what makes each quarter better than the last.

EXAMPLE — MAPLE & CO.

GOAL	TARGET	RESULT	HIT?
Revenue	\$30,000	\$31,200	Yes
Email list	3,200	3,050	Close
Autumn line launch	Done	Launched	Yes

Maple & Co. beat its revenue goal and launched the line; the email list came up just short — a clear focus for next quarter.

YOUR QUARTER IN REVIEW

GOAL	TARGET	RESULT	HIT?

 REFLECTION QUESTIONS

What are you most proud of this quarter?

What is the biggest lesson you are taking forward?

▶ TIP

Celebrate before you critique. Acknowledging your wins is not indulgent — it builds the motivation and confidence you will need to set bold goals for the next quarter.

09

REVIEW & REFLECT

Next Quarter Planning

Momentum compounds when you roll straight into the next cycle. Carry forward what is unfinished, apply your lessons, and set the direction for the quarter ahead — then start the planner again.

Carry Forward

UNFINISHED GOAL OR IDEA TO CARRY INTO NEXT QUARTER

Next Quarter At A Glance

NEXT QUARTER THEME / WORD

REVENUE TARGET

QUARTER & YEAR

NEXT QUARTER — TOP 3 PRIORITIES

#	PRIORITY GOAL
1	
2	
3	

▶ TIP
 Plan your next quarter within a week of finishing this one, while the lessons are fresh. The most consistent businesses are never between plans — they are always working an active 90-day cycle.



WRAP-UP

Plan The Quarter, Work The Weeks

You now have a complete system to turn ambition into achievement, 90 days at a time: a clear vision, focused goals, weekly milestones, supporting habits, and the reviews that keep it all on track.

Your Quarterly Rhythm

◆ **PLAN**

Set vision, goals, and your 90-day map.

◆ **WORK**

Hit weekly milestones; keep your habits.

◆ **REVIEW**

Check in, reflect, and plan the next quarter.

*"A goal without a plan is just a wish.
A quarter with a plan is momentum."*

Start a fresh copy of this planner every quarter — and watch a year of focused 90-day cycles transform your business.