GOALS & GROWTH / A WORKING QUARTERLY PLAN

VISION / MILESTONES / HABITS / REVIEW

# Quarterly Business Goal Planner

*Give ambition a place to grow.*

A practical system for choosing priorities, planning the weeks and learning from your results.



## A PLAN YOU CAN RETURN TO

01 Three clear priorities.

02 Thirteen weeks of purposeful action.

03 Space to reflect and carry work forward.

BUSINESS / OWNER

For founders, online sellers, makers, service businesses and growing teams.

START HERE

# A rhythm for the quarter



Turn a broad intention into a few clear goals, visible milestones and a repeatable review.

Choose three main priorities, then work through this planner in order. Return to the working pages as your quarter develops. A useful plan leaves room for evidence, changed conditions and the next good decision.

## 01 Focus

Name what matters now and what can wait for another planning cycle.

## 02 A visible deadline

Set an end date and milestones you can check along the way.

## 03 Momentum

Use weekly actions and repeatable habits to support the goals.

## 04 Course correction

Review what happened, revise the approach and keep useful work moving.

**USE YOUR ACTUAL DATES**

“90-day planning” is shorthand here. Calendar quarters span 90–92 days; 13 weeks span 91 days. Enter the actual start and end dates, and include any partial week in the nearest planning row.

Printable fields do not calculate automatically. All Maple & Co. figures are fictional, not benchmarks. Habit ideas: publish planned content, reply to messages, ship within promised times, schedule focused work and review key numbers. Try attaching an action to an existing routine.

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*Plan the quarter. Work the weeks. Review what you learn.*

THE PLANNING CYCLE

# How the system works

Keep the process simple enough to repeat and specific enough to guide decisions.

## 01 Set the vision

Choose a theme and your top three priorities.

## 02 Define the goals

Give revenue, marketing and product goals clear outcomes.

## 03 Map the quarter

Set monthly milestones, then plan the weeks.

## 04 Build supporting habits

Choose actions you control and a useful frequency.

## 05 Review regularly

Check monthly and reset around the middle of the quarter.

## 06 Reflect & plan again

Use results and lessons to shape the next cycle.

MAKE THE GOAL SMART

| ELEMENT | CHECK | EXAMPLE |
|---|---|---|
| Specific | Clear outcome | Grow the email list |
| Measurable | Number or verifiable result | Add 800 net subscribers |
| Achievable | Supported by capacity | Choose a feasible acquisition plan |
| Relevant | Connected to a priority | Support the autumn product launch |
| Time-bound | Defined finish date | By the quarter’s end |

**A COMPLETE GOAL**

Grow the email list from 2,400 to 3,200 subscribers by quarter-end, using a new opt-in and a planned promotion schedule. Name the baseline, outcome, action and deadline.

01 / CHOOSE WHAT MATTERS

# Vision & priorities



Start with the direction of your business, then choose the three outcomes that matter most this quarter.

**MAPLE & CO. / FICTIONAL EXAMPLE**

Vision: a cozy home brand for small spaces. Theme: Focus. Priorities: reach $30,000 revenue, grow the email list to 3,200 and launch the autumn candle line.

MY LONGER-TERM VISION / WHERE I AM HEADED

THEME / WORD FOR THE QUARTER

QUARTER & YEAR

MY THREE PRIORITIES

| # | PRIORITY GOAL | WHY IT MATTERS NOW |
|---|---|---|
| 1 | | |
| 2 | | |
| 3 | | |

When a new idea appears, compare it with these priorities. Carry useful ideas forward on page 16.

02 / PUT A NUMBER TO THE PLAN

# Quarterly revenue goals

Use your own sales history, capacity and demand assumptions. Revenue targets are not profit forecasts.

MAPLE & CO. / FICTIONAL EXAMPLE

| PERIOD | REVENUE | WHAT NEEDS TO HAPPEN |
|---|---|---|
| Month 1 | $9,000 | Steady sales and email promotion |
| Month 2 | $10,000 | Autumn line preorders |
| Month 3 | $11,000 | Full launch and seasonal promotion |
| **Quarter** | **$30,000** | **25% above the prior $24,000 quarter** |

Growth % = (new target − previous actual) ÷ previous actual × 100. If the previous figure is zero, percentage growth is undefined; compare the dollar change instead.

YOUR REVENUE PLAN / CURRENCY: _____

| PERIOD | TARGET | WHAT NEEDS TO HAPPEN |
|---|---|---|
| Month 1 | | |
| Month 2 | | |
| Month 3 | | |
| **Quarter total** | | |

REVENUE BY SOURCE / OPTIONAL

| SOURCE / CHANNEL | TARGET | PRIOR QUARTER |
|---|---|---|
| | | |
| | | |
| | | |

$30,000 ÷ 13 weeks = $2,307.69 per week on average. Adjust weekly targets for seasonality.

03 / CONNECT ACTIVITY TO AN OUTCOME

# Marketing goals

Choose a metric, baseline, target and action for each marketing goal. Track results without assuming every activity will produce sales.

MAPLE & CO. / FICTIONAL EXAMPLE

| GOAL | METRIC | BASELINE / TARGET | KEY ACTION |
|---|---|---|---|
| Grow email list | Subscribers | 2,400 / 3,200 | Launch a useful opt-in |
| Grow Instagram | Followers | 8,000 / 9,500 | 3 Reels per publishing week |
| Publish consistently | Posts | 36 in the quarter | Batch for 12 publishing weeks |
| Drive traffic | Store visits | Prior quarter / +30% | Test Pinterest search content |

Example schedule: 12 publishing weeks × 3 posts = 36; use the remaining week for review.

YOUR MARKETING GOALS

| GOAL | METRIC | BASELINE / TARGET | KEY ACTION |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

WHICH GOAL BEST SUPPORTS REVENUE? WHAT ATTENTION DOES IT NEED?

04 / MAKE THE OUTCOME CONCRETE

# Product development goals

Name what will be created or improved, what “done” means and when it needs to happen.

MAPLE & CO. / FICTIONAL EXAMPLE

| PROJECT | OUTCOME | BY WHEN | STATUS |
|---|---|---|---|
| Autumn candles | 4 scents ready for preorders | Month 2 | Planned |
| Best-seller packaging | Refresh packaging and inserts | Month 1 | In progress |
| Gift bundles | Create 2 bundle sets | Month 3 | Planned |

Launch sequence: prepare the scents and open preorders in Month 2; run the full autumn release in Month 3. Use dates that fit production and promised delivery times.

YOUR PRODUCT GOALS

| PROJECT | GOAL / OUTCOME | BY WHEN | STATUS |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

WHICH PROJECT BEST SUPPORTS REVENUE, AND WHAT IS ITS FIRST STEP?

THE GOAL MAP

# Your quarter at a glance

Bring the priorities, targets and definition of success together on one page.

QUARTER / YEAR

START DATE

END DATE

QUARTER THEME / WORD

THREE PRIORITIES

PRIORITY 1

PRIORITY 2

PRIORITY 3

REVENUE GOAL

MARKETING GOAL

PRODUCT GOAL

HOW I WILL KNOW I SUCCEEDED

05 / SET THE MILESTONES

# The monthly roadmap

Give each month a theme and two or three meaningful outcomes. Sequence the work that other tasks depend on.

MAPLE & CO. / FICTIONAL EXAMPLE

| MONTH | THEME | KEY MILESTONES |
|---|---|---|
| 1 | Build the base | Launch email opt-in; refresh packaging |
| 2 | Create & tease | Finish scents; open preorders |
| 3 | Launch & promote | Full release; work toward $30,000 quarter |

YOUR THREE-MONTH ROADMAP

| MONTH / DATES | THEME / FOCUS | KEY MILESTONES |
|---|---|---|
| Month 1 | | |
| Month 2 | | |
| Month 3 | | |

IS ONE MONTH OVERLOADED? WHAT CAN MOVE, AND WHAT MUST HAPPEN FIRST?

05 / WORK THE WEEKS

# The 13-week milestone tracker

Give each week one clear focus. Add actual dates and mark the milestone when it is complete.

**MAPLE & CO. / EXAMPLE SEQUENCE**

Week 1: email opt-in. Week 5: scents and photos. Week 8: preorders. Week 9: full launch. Week 13: seasonal promotion and quarter review.

| WEEK | DATES | FOCUS / MILESTONE | DONE |
|---|---|---|---|
| 1 | | | ☐ |
| 2 | | | ☐ |
| 3 | | | ☐ |
| 4 | | | ☐ |
| 5 | | | ☐ |
| 6 | | | ☐ |
| 7 | | | ☐ |
| 8 | | | ☐ |
| 9 | | | ☐ |
| 10 | | | ☐ |
| 11 | | | ☐ |
| 12 | | | ☐ |
| 13 | | | ☐ |

Thirteen weeks = 91 days. Fit partial weeks to the dates on page 9 and reassign unfinished milestones.

06 / SUPPORT THE GOALS

# Monthly habit tracking

Use one copy each month. Choose actions you control, a realistic frequency and an existing routine that can cue them.

MONTH & YEAR

OVERALL HABIT GOAL / E.G. 5 DAYS A WEEK

| ID | HABIT / ACTION | PLANNED FREQUENCY |
|---|---|---|
| H1 | | |
| H2 | | |
| H3 | | |
| H4 | | |
| H5 | | |
| H6 | | |

| ID | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| H1 | | | | | | | | | | | | | | | | |
| H2 | | | | | | | | | | | | | | | | |
| H3 | | | | | | | | | | | | | | | | |
| H4 | | | | | | | | | | | | | | | | |
| H5 | | | | | | | | | | | | | | | | |
| H6 | | | | | | | | | | | | | | | | |

| ID | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| H1 | | | | | | | | | | | | | | | |
| H2 | | | | | | | | | | | | | | | |
| H3 | | | | | | | | | | | | | | | |
| H4 | | | | | | | | | | | | | | | |
| H5 | | | | | | | | | | | | | | | |
| H6 | | | | | | | | | | | | | | | |

Mark completed days; cross out unused dates. Review missed days and adjust the plan.

07 / REVIEW PROGRESS

# The monthly check-in

Compare results with the target due by the review date. Choose the next adjustment and make a fresh copy next month.

MAPLE & CO. / END OF MONTH 1

| GOAL | TARGET TO DATE | ACTUAL | STATUS |
|---|---|---|---|
| Revenue | $9,000 | $9,400 | Ahead |
| Email list | 2,700 | 2,610 | Behind |
| Autumn line | Design complete | Design complete | On track |

The opt-in slipped from its planned Week 1 date. Next action: finish it and run the delayed promotion in Month 2. Revenue is ahead; email acquisition needs attention.

REVIEW DATE / MONTH / REPORTING PERIOD

| GOAL | TARGET TO DATE | ACTUAL | STATUS |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

WHAT WENT WELL, AND WHAT FELL BEHIND?

ONE ADJUSTMENT FOR NEXT MONTH

07 / CHECK THE DIRECTION

# The mid-quarter reset



Around Week 6 or 7, review the priorities and the work needed to finish them. Adjust the approach using what you have learned.

| PRIORITY | STATUS | WHAT IT NEEDS TO FINISH |
|---|---|---|
| 1. | | |
| 2. | | |
| 3. | | |

Status: Ahead / On track / Behind. Add a date or dependency where it helps.

WHAT IS WORKING WELL AND DESERVES MORE ATTENTION?

WHAT IS NOT WORKING? WHAT WILL I CHANGE OR SET ASIDE?

THE ONE PRIORITY I MOST WANT TO FINISH / TIME I WILL PROTECT

08 / RESULTS, WINS & LESSONS

# Quarterly reflection

Compare your results with the original targets. Recognize the progress and record what the next quarter can build on.

MAPLE & CO. / FICTIONAL QUARTER-END RESULTS

| GOAL | TARGET | RESULT | MET? |
|---|---|---|---|
| Revenue | $30,000 | $31,200 | Yes |
| Email list | 3,200 | 3,050 | No |
| Autumn release | Launched | Launched | Yes |

Revenue finished 4% above target. The email list gained 650 subscribers from its 2,400 baseline, ending 150 below target. Both the progress and the remaining gap inform the next plan.

YOUR QUARTER IN REVIEW

| GOAL | TARGET | RESULT | MET? |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

WHAT AM I MOST PROUD OF THIS QUARTER?

THE BIGGEST LESSON I AM TAKING FORWARD

09 / CARRY THE WORK FORWARD

# Next-quarter planning



Keep useful unfinished work, apply your lessons and choose the direction of the next quarter.

| UNFINISHED GOAL OR IDEA TO CARRY FORWARD |
| --- |
| |
| |
| |

NEXT QUARTER THEME / WORD

REVENUE TARGET / CURRENCY

QUARTER & YEAR

NEXT QUARTER / TOP THREE PRIORITIES

| # | PRIORITY GOAL |
| --- | --- |
| 1 | |
| 2 | |
| 3 | |

*Plan the quarter. Work the weeks. Review what you learn.*