Sample Annual Planning Calendar: A Quarterly Cadence

Q1

January

Quarterly Review

- Assess Progress
- Reinforce Compass
- Measure Goal Progress
- Clarify/Create Q1 Goals

February

Monthly Check-In

Review/Measure Progress on Q1 Goals

March

Monthly Check-In

Review/Measure Progress on Q1 Goals

Q2

April

Quarterly Review

- Assess Progress
- Reinforce Compass
- Measure Goal Progress
- Clarify/Create Q2 Goals

May

Monthly Check-In

Review/Measure Progress on Q2 Goals

June

Monthly Check-In

Review/Measure Progress on Q2 Goals

Q3

July

Quarterly Review

- Assess Progress
- Reinforce Compass
- Measure Goal Progress
- Clarify/Create Q3 Goals

August

Monthly Check-In

Review/Measure Progress on Q3 Goals

September

Monthly Check-In

Review/Measure Progress on Q3 Goals

Q4

October

Quarterly Review

- Assess Progress
- Reinforce Compass
- Measure Goal Progress
- Clarify/Create Q4 Goals

November

Monthly Check-In

Review/Measure Progress on Q4 Goals

December

Monthly Check-In

Review/Measure Progress on Q4 Goals

ANNUAL

Annual Planning

Review/Revise Your Planning Process

Review/Refine Compass and Long-Term Vision

Create Plan for Next Year