

90-Day Priority Planning Template

Company: _____ **Quarter:** Q__ 20__ **Planning Date:** _____ **Team Members:** _____

WHAT ARE QUARTERLY PRIORITIES?

Quarterly Priorities are your 3-7 most important focus areas for the next 90 days. They're the big, important things that move your business forward — not the endless stream of daily tasks. Different frameworks call them by different names: Scaling Up calls them Priorities, OKRs calls them Objectives, 4DX calls them Wildly Important Goals (WIGs).

Good Quarterly Goals are: ☒ Specific and measurable ☒ Achievable in 90 days ☒ Aligned with your 1-Year Plan ☒ Owned by one person ☒ High-impact priorities

17 QUARTER OVERVIEW

Quarter Dates: _____ to _____ **Days in Quarter:** 90

This Quarter's Theme/Focus:

QUARTERLY GOAL SELECTION PROCESS

STEP 1: Review Your 1-Year Plan

What are your top 3-5 goals for this year?

1. _____
2. _____
3. _____
4. _____
5. _____

Which of these goals need focus THIS quarter?

STEP 2: Brainstorm Potential Quarterly Goals

What are all the potential priorities for this quarter?

Potential Quarterly Goal	Impact (H/M/L)	Effort (H/M/L)	Score

STEP 3: Prioritize Using the Impact/Effort Matrix

High Impact + Low Effort = DO FIRST
High Impact + High Effort = IMPORTANT QUARTERLY GOALS
Low Impact = NOT A QUARTERLY GOAL (or delegate)



Quadrant 1 (High Impact, Low Effort):

Quadrant 2 (High Impact, High Effort):

STEP 4: Select Your 3-7 Company Quarterly Goals

Remember: Less is more. 3-7 quarterly goals only. If everything is a priority, nothing is.

COMPANY QUARTERLY GOALS FOR Q___ 20___

QUARTERLY GOAL #1

Goal Title:

Owner: _____

Due Date: _____

Success Criteria (How do we know it's done?):

Why This Goal Matters:

Milestones:

- ☐ Week 4: _____
- ☐ Week 8: _____
- ☐ Week 12: _____

Dependencies/Blockers:

Resources Needed:

QUARTERLY GOAL #2

Goal Title:

Owner: _____

Due Date: _____

Success Criteria (How do we know it's done?):

Why This Goal Matters:

Milestones:

- ☐ Week 4: _____
- ☐ Week 8: _____
- ☐ Week 12: _____

Dependencies/Blockers:

Resources Needed:

QUARTERLY GOAL #3

Goal Title:

Owner: _____

Due Date: _____

Success Criteria (How do we know it's done?):

Why This Goal Matters:

Milestones:

- ☐ Week 4: _____
- ☐ Week 8: _____
- ☐ Week 12: _____

Dependencies/Blockers:

Resources Needed:

QUARTERLY GOAL #4 (Optional)

Goal Title:

Owner: _____

Due Date: _____

Success Criteria:

QUARTERLY GOAL #5 (Optional)

Goal Title:

Owner: _____

Due Date: _____

Success Criteria:

QUARTERLY GOAL #6 (Optional)

Goal Title:

Owner: _____

Due Date: _____

Success Criteria:

[illegible]

Quarterly Goal	Owner	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12
3.		  	  	  	  	  	  	  	  	  	  	  	  
4.		  	  	  	  	  	  	  	  	  	  	  	  
5.		  	  	  	  	  	  	  	  	  	  	  	  

Status:

-  **On Track** - Will complete on time
-  **At Risk** - May not complete without intervention
-  **Off Track** - Will not complete without major changes

EXAMPLES OF GOOD QUARTERLY GOALS

Good Examples:

 "Launch new product with 100 beta customers by March 31"
  "Hire and onboard VP of Sales who generates \$500K pipeline by Q end"
  "Reduce customer churn from 8% to 5% by implementing retention program"
  "Complete office move and have all team fully operational by June 15"
  "Achieve 95% customer satisfaction score through improved support process"

Bad Examples:

 "Work on marketing" - Too vague
  "Improve sales" - Not measurable
  "Be more profitable" - Not specific
 "Redesign entire product line" - Too big for 90 days
  "Send weekly reports" - That's a to-do, not a Quarterly Goal

QUARTERLY GOAL RESCUE: When Goals Go Off Track

If a Quarterly Goal turns yellow or red for 2+ weeks:

1. **Make it an Issue** in your Weekly Leadership Meeting
2. **Use Issue Resolution** (Identify, Discuss, Solve)
3. **Options:**
 - Remove blockers
 - Add resources
 - Adjust scope
 - Change owner
 - Drop the Quarterly Goal (if no longer relevant)

Track Off-Track Quarterly Goals:

Quarterly Goal	Weeks Off Track	Root Cause	Action Plan

QUARTERLY GOAL REVIEW

At End of Quarter (Before Next Planning Session)

Completion Rate

Quarterly Goals Completed: ____ / ____ **Completion Rate:** ____% **Target:** 80%+

What Went Well:

What Didn't Go Well:

Lessons Learned:

What to Do Differently Next Quarter:

QUARTERLY GOAL PLANNING BEST PRACTICES

DO:

 Limit to 3-7 company quarterly goals
  Make them specific and measurable
  Assign one clear owner
  Set realistic 90-day timeframes
  Break into monthly milestones
  Review weekly in Weekly Leadership Meetings
  Celebrate completions

DON'T:

❌ Have more than 7 quarterly goals ❌ Make them too vague ❌ Assign to multiple people ❌ Set unrealistic goals ❌ Ignore them between planning sessions ❌ Punish for failure (learn instead) ❌ Change quarterly goals mid-quarter without good reason

CONNECT QUARTERLY GOALS TO PROJECT MANAGEMENT

GoalCadenace Integration:

- Sync Quarterly Goals with Asana, Monday.com, or Jira
- Automatic progress updates from project tasks
- See real completion %, not estimates
- Update once in PM tool, reflects everywhere

Manual Tracking:

- Weekly status updates in Weekly Leadership Meeting
 - Progress percentages based on milestones
 - Owner provides quick update (30 seconds max)
-

Ready to stop losing track of your quarterly priorities? Try GoalCadenace free!

 **Download:** [Microsoft Word \(.docx\)](#)

 **More templates:** goalcadenace.com/resources