

Quarterly Planning Session Workbook

Company: _____ Quarter Being Planned: Q__ 20__ Planning
Session Date: _____ Facilitator: _____ Attendees: _____



QUARTERLY PLANNING OVERVIEW

What is a Quarterly Planning Session?

A 4-8 hour session (or full day) where your leadership team:

- Reviews last quarter's results
- Celebrates wins
- Identifies lessons learned
- Sets Quarterly Goals for the next 90 days
- Aligns on priorities
- Solves key issues

Frequency: Every 90 days **Duration:** 4-8 hours (half day to full day) **Attendees:** Leadership team only



PLANNING SESSION AGENDA

Total Time: 4-8 hours

Time	Activity	Duration	Purpose
0:00-0:15	Check-in & Opening	15 min	Align and energize

Time	Activity	Duration	Purpose
0:15-0:45	Previous Quarter Review	30 min	Learn from results
0:45-1:15	Strategic Plan Review	30 min	Ensure alignment
1:15-2:15	Issues Identification	60 min	Surface obstacles
2:15-2:30	BREAK	15 min	
2:30-4:30	Issue Resolution	120 min	Solve major problems
4:30-5:30	Quarterly Goal Selection	60 min	Set priorities
5:30-6:00	Recap & Commitments	30 min	Align and close

1 CHECK-IN & OPENING (15 minutes)

Opening Question

(Choose one or create your own)

- ☐ What's one word that describes how you're feeling about the past quarter?
- ☐ What are you most excited about for the next 90 days?
- ☐ Share one personal or professional win from last quarter

Team Responses:

Name	Response

Session Norms

- ☐ Everyone participates equally
- ☐ Be present (no phones/laptops except for note-taking)
- ☐ Be open and honest
- ☐ Disagree and commit
- ☐ Start and end on time
- ☐ Take breaks as needed

2 PREVIOUS QUARTER REVIEW (30 minutes)

Quarter Just Completed: Q__ 20__

Dates: _____ to _____

Quarterly Goal Completion Review

Quarterly Goals from Last Quarter:

Quarterly Goal	Owner	Status	% Complete	Notes
1.		☒ ☐	__%	
2.		☒ ☐	__%	
3.		☒ ☐	__%	
4.		☒ ☐	__%	
5.		☒ ☐	__%	
6.		☒ ☐	__%	

Quarterly Goal	Owner	Status	% Complete	Notes
7.		✓ ✗	____%	

Completion Rate: ____ / ____ = ____%

Target: 80%+

Scorecard Performance

Key Metrics Performance:

Metric	Target	Average Actual	Status	Trend
				↑ → ↓
				↑ → ↓
				↑ → ↓
				↑ → ↓
				↑ → ↓

Metrics at or above goal: ____ / ____

Wins & Celebrations

What went exceptionally well last quarter?

1.

2.

3.

4.

5.

Individual Shout-outs (Recognize team members):

Challenges & Lessons Learned

What didn't go as planned?

Challenge	Impact	Lesson Learned	Apply to Next Quarter

What would we do differently?

3 STRATEGIC PLAN REVIEW (30 minutes)

Core Values Check

Are our Core Values still accurate and lived?

Core Value	Still Accurate?	Being Lived?	Action Needed
1.	☒ ☒	☒ ☒	
2.	☒ ☒	☒ ☒	
3.	☒ ☒	☒ ☒	
4.	☒ ☒	☒ ☒	
5.	☒ ☒	☒ ☒	

Core Focus Validation

Current Core Focus:

Purpose:

Niche:

Still accurate? ☒ YES | ☒ NO (If no, what needs to change?)

10-Year Target Progress

10-Year Target:

Are we still on track? YES | ADJUST | NO

Progress this quarter:

1-Year Plan Review

1-Year Goals:

Goal	Progress	On Track?	Notes
1.	___%		
2.	___%		
3.	___%		
4.	___%		
5.	___%		

Are we on pace to hit our 1-Year Plan? YES | MAYBE | NO

Adjustments needed:

4 ISSUES IDENTIFICATION (60 minutes)

Brainstorm ALL Issues

Instructions: Capture every issue, obstacle, opportunity, or idea. No discussion yet!

Issues from:

- Scorecard review
- Priorities that didn't complete
- Customer feedback
- Employee feedback
- Market changes
- Strategic opportunities
- Process problems
- People challenges

#	Issue	Category	Impact (H/M/L)
1		People / Process / Customer / Strategic / Other	
2		People / Process / Customer / Strategic / Other	
3		People / Process / Customer / Strategic / Other	
4		People / Process / Customer / Strategic / Other	
5		People / Process / Customer / Strategic / Other	
6		People / Process / Customer / Strategic / Other	
7		People / Process / Customer / Strategic / Other	
8		People / Process / Customer / Strategic / Other	
9		People / Process / Customer / Strategic / Other	

#	Issue	Category	Impact (H/M/L)
10		People / Process / Customer / Strategic / Other	
11		People / Process / Customer / Strategic / Other	
12		People / Process / Customer / Strategic / Other	
13		People / Process / Customer / Strategic / Other	
14		People / Process / Customer / Strategic / Other	
15		People / Process / Customer / Strategic / Other	
16		People / Process / Customer / Strategic / Other	
17		People / Process / Customer / Strategic / Other	
18		People / Process / Customer / Strategic / Other	
19		People / Process / Customer / Strategic / Other	
20		People / Process / Customer / Strategic / Other	

Prioritize Top 5 Issues

Vote on which issues are most important to solve:

Rank	Issue	Votes	Priority
1			 HIGH
2			 HIGH

Rank	Issue	Votes	Priority
3			🔴 HIGH
4			🟡 MED
5			🟡 MED

5 ISSUE RESOLUTION (120 minutes)

ISSUE #1: _____

Time Box: 25 minutes

IDENTIFY

DISCUSS

SOLVE

Solution:

Action Items:

- ☐ _____ | Owner: _____ | Due: _____
- ☐ _____ | Owner: _____ | Due: _____

Status:  SOLVED |  ONGOING |  BECOMES A QUARTERLY PRIORITY

ISSUE #2: _____

Time Box: 25 minutes

Identify, Discuss, Solve

Action Items:

- ☐ _____ | Owner: _____ | Due: _____

ISSUE #3: _____

Time Box: 25 minutes

Identify, Discuss, Solve

Action Items:

- ☐ _____ | Owner: _____ | Due: _____
-

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Next Quarter: Q___ 20__

Dates: _____ to _____

Brainstorm Potential Quarterly Goals

Based on:

- 1-Year Plan goals
- Issues that need to become Quarterly Goals
- Strategic priorities
- Key opportunities

[illegible]

Potential Quarterly Goal	Impact	Owner	Aligns with 1-Year Goal
	H / M / L		

Final Company Quarterly Goals for Q____ 20____

Select 3-7 most important priorities:

QUARTERLY GOAL #1

Owner: _____ Due: _____

QUARTERLY GOAL #2

Owner: _____ Due: _____

QUARTERLY GOAL #3

Owner: _____ Due: _____

QUARTERLY GOAL #4

Owner: _____ Due: _____

QUARTERLY GOAL #5

Owner: _____ Due: _____

QUARTERLY GOAL #6 (Optional)

Owner: _____ Due: _____

QUARTERLY GOAL #7 (Optional)

Owner: _____ Due: _____

7 RECAP & COMMITMENTS (30 minutes)

Key Takeaways

What are the 3 most important things from today's session?

1. _____
2. _____
3. _____

Cascading Message

What do we need to communicate to our teams?

Who will communicate it: _____

By when: _____

Individual Commitments

Each person shares ONE key commitment for next quarter:

Name	Commitment

Session Feedback

Rate this planning session: _____ / 10

What made it valuable:

What would make it a 10 next time:

POST-SESSION ACTION ITEMS

- ☐ Document all Quarterly Goals in project management system
- ☐ Send session summary to all attendees
- ☐ Communicate cascading messages to teams
- ☐ Add unresolved issues to weekly open issues list
- ☐ Schedule next Quarterly Planning Session
- ☐ Update Strategic Plan if any changes were made
- ☐ Set up Quarterly Goal tracking in GoalCadence

17 QUARTERLY PLANNING SCHEDULE

Plan your year:

Quarter	Planning Session Date	Notes
Q1		
Q2		
Q3		
Q4		

Track your Quarterly Goals and run better Quarterly Planning Sessions with GoalCadence. Try free!

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

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