

Yearly & Quarterly planning

Part I: The yearly & quarterly view

This is where you will fill in your information after each planning step. You can put this view anywhere on your computer or in real life to look at for regular reference.

The last three pages of this template contain the view. You will fill them out at the end of the exercise.

Part II: Yearly goals (Yearly)

Have a look at the aspects of life. Consider each category and rate it from one to ten according to its importance for you on the next page.

Aspects of life

HEALTH

RECREATION

SOCIAL LIFE

ROMANTIC LIFE

CAREER

MONEY

PERSONAL GROWTH

PHYSICAL ENVIROMENT

HEALTH	
RECREATION	
SOCIAL LIFE	
ROMANTIC LIFE	
CAREER	
MONEY	
PERSONAL GROWTH	
PHYSICAL ENVIROMENT	

Step I: According to the score, What are your top three aspects? Write them below.

Step II: Set a maximum of three goals between your top three aspects. This might mean 3 goals for one aspect, 2 goals for one, and 1 goal for another aspect, or 1 goal for each aspect.

Step III: Make sure your goals are SMART (Specific, Motivating, Attainable, Realistic, Time-Bound). Instead of writing "Eat healthily", write "Quit sugar and soft drinks".

TOP ASPECTS 1, 2 & 3

GOALS 1, 2, 3

Part III: Milestones, Habits & Actions (Quarterly)

Step I: Quarterly milestones

Look at each goal and think about how much you can accomplish towards it in the next quarter. This is your quarterly milestone.

GOALS 1, 2 & 3

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MILESTONES 1, 2 & 3

Step II: Quarterly habits & actions

Are there any habits that you need to adopt to achieve your quarterly milestones? If not applicable, are there any actions that you need to take to achieve your quarterly milestones?

Write down one to two habits or actions that you can realistically perform and track in the next quarter to achieve your milestone.

MILESTONES 1, 2 & 3

ACTIONS OR HABITS 1 & 2

Part IV: Creating wish lists (Whenever you need)

There's more to life than goals, milestones, and habits. There are also just things you want to do for fun and experimentation. Creating and maintaining wish lists helps you stay on top of and realize some general ideas you would like to act on.

Look at each category and see if you can write down some one-off things you would like to do.

Career – i.e. ask for a raise

Health – i.e. book appointment, buy vitamins

Money – i.e. start investing

Social Life – i.e. call up Jane for coffee

Recreation – i.e. book a massage

Romantic Life – i.e. plan a romantic getaway

Personal Growth – i.e. start a new yoga class

Physical Environment – i.e. purchase a new painting

Extra categories:

To buy – i.e. sunrise clock, candles

To read – i.e. the hunger games

To listen – i.e. the minimalist's podcast

To watch – i.e. the joker

Part V: Create a vision board (Optional, Yearly)

Create the vision board using Canva and place it in a prominent place. If you are using Notion, it could be the background of this page. It could also be your phone or desktop wallpaper, or a real printout on your wall.

Part VI: Fill in the yearly plans view (Yearly)

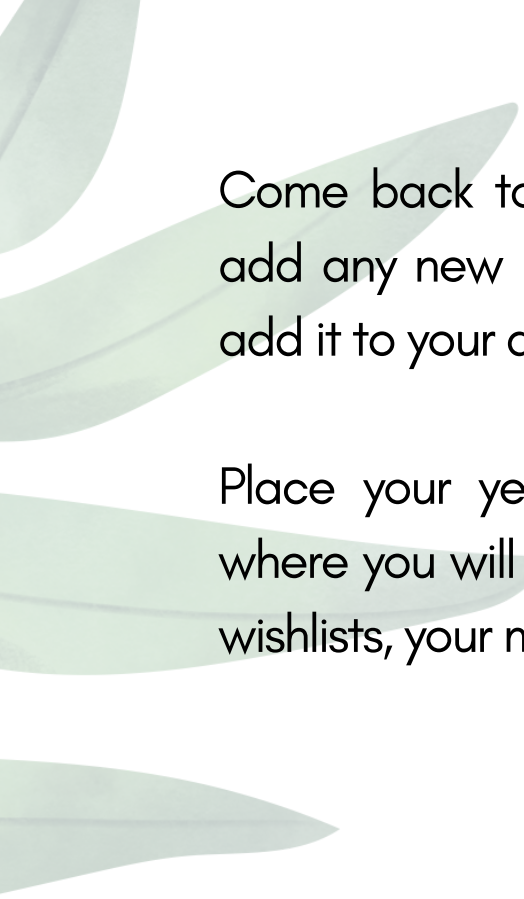
Fill all the information you gathered neatly into your yearly view. From now on, you can use it for reference whenever you are doing quarterly and weekly reviews and planning!

Next Steps: How to use your yearly & quarterly plan?

Track and apply your habits and actions to reach your milestones and eventually your long-term goals.

Weekly: take five minutes to look at your wish list, habits, and actions and add them as real events in your weekly plans where possible.

Quarterly: review your milestones and habits. Adjust them if you need to and plan the milestones and habits for the next quarter.



Come back to your wish list whenever you wish and add any new ideas. If you are ready to plan an idea, add it to your quarterly plans.

Place your yearly planning sheet somewhere visible where you will often be reminded to check in with your wishlists, your milestones and your goal progress.

Yearly & Quarterly - plans -

My Yearly Goals

Quarter One

MILESTONES 1, 2 & 3

ACTIONS OR
HABITS 1 & 2

Quarter Two

MILESTONES 1, 2 & 3

ACTIONS OR
HABITS 1 & 2

Quarter Three

MILESTONES 1, 2 & 3

ACTIONS OR
HABITS 1 & 2

Quarter Four

MILESTONES 1, 2 & 3

ACTIONS OR HABITS 1 & 2			

Quarterly Plans

assign wish list items here

QUARTER ONE

QUARTER TWO

QUARTER THREE

QUARTER FOUR

Wish Lists

CAREER

HEALTH

MONEY

SOCIAL LIFE

RECREATION

ROMANTIC LIFE

PERSONAL GROWTH

Wish Lists

PHYSICAL ENVIRONMENT

TO BUY

TO READ

TO WATCH

TO LISTEN