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dynamite circle

Quarterly Goals

Turn your vision into actionable steps

Quarterly goals can be one of the more helpful tools when it comes to maintaining direction and alignment. You can break down your long-term vision into specific, measurable targets, measure progress and adjust your plans as needed to stay on track.

Quarterly goals can help you:

1. Focus: Quarterly goals help you and your team focus on specific objectives and priorities, avoiding shiny object distractions and improving all-around productivity.
2. Alignment: Quarterly goals align your team with your organization's long-term strategy and mission, ensuring everyone is moving in the same direction.
3. Agility: Quarterly goals allow you to adapt quickly to changes in the market or industry, adjusting priorities and strategies as needed.
4. Accountability: Quarterly goals create a sense of accountability and ownership, helping team members take responsibility for their work and outcomes.

How to Create Quarterly Goals:

1. Start with the big picture: Review your long-term vision and 3-year plan, and identify the key areas of focus for the next 12 months.

2. Set specific objectives: List out the top priorities that will move you closer to your long-term plans.
3. Prioritize: Identify the 1 - 5 most impactful priorities from your list.
4. Assign a success measure: Define the specific action, deliverable, or metric that signals that you have successfully accomplished your goal.
5. Assign ownership: Assign clear ownership for each goal to specific team members or departments, and ensure everyone understands their roles and responsibilities in contributing to success.
6. Monitor progress: Regularly track progress against each quarterly goal, making adjustments as needed to stay on track.
7. Celebrate success: Recognize and celebrate milestones and achievements along the way, and use them as motivation to keep pushing forward.

Instructions:

1. Pull in the 3-year goals that you have outlined in the pre-work worksheet
2. Identify what needs to be accomplished in the next 12 months to make progress towards your 3-year goals.
    a. What specific revenue number do you need to reach?
    b. Any specific strides from a product or services perspective?
    c. Does the organization need to grow or change to build towards the next three years?

3. Based on what you have outlined for the next 12 months, what needs to happen this quarter to make progress toward those goals?
    a. What specific revenue number?
    b. Product development?
    c. Team changes?
    d. Operational projects?
4. Develop 1 - 5 priorities for the quarter and articulate them in the boxes below. Each priority should have a main objective and a success measure attached to it. You can think about a success measure as how you will know that you have accomplished your goal. For example, if you have a priority to “Get traction in x new market,” a success measure may be “10 new clients in x market.”

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3-year goals:

1. *[Revenue Goal]*
2. *[New product/New market]*
3. *[Team size, organizational change]*

Next 12 months:

1. *[Revenue Goal]*
2. *[New product/New market]*
3. *[Team size, organizational change]*

Quarterly goal:

1. *[Revenue Goal]*
2. *[Northstar metric Goal]*

Quarterly Priority #1	*[Fill up our pipeline with new leads]*
Success Measure(s) *(How will you know you accomplished your priority?)*	• *[# of sign-ups on our sales page increased by 50%]* • *[# of demos increased by 25%]*
Quarterly Priority #2	*[Make our customers happy]*
Success Measure(s) *(How will you know you accomplished your priority?)*	• *[NPS score of 95 or above]* • *[CSAT score of 90 or above]* • *[Avg customer product usage at 1/week]*

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Quarterly Priority #3	*[Refine our hiring process]*
Success Measure(s) *(How will you know you accomplished your priority?)*	• *Hiring SOP created and in use with 100% of new roles*