

My Quarterly Review

for [Work in Progress](#) readers

Hi there! Here's my template for doing a quarterly review. I walk you through it in my [newsletter](#).

Go ahead and make a copy of this document for yourself. Go to File → Make a copy. (Or select all and copy to a new file.) Give it a name that makes sense for you. Then:

Follow the steps. They're ordered so that you'll end with the top section. That way, the document starts with your goals for the next few months. When you look back later, they'll be hard to miss.

Enjoy!

–Rick Pastoor

PS You can find the template for doing a YearPlanDay [here](#).

Step 4: Goals to focus on this quarter

After you've completed the other steps, come back and jot down your goals for the coming quarter here:

Step 1: Highlights

Start by taking a good look at the past three months. What went well? What could have gone better? Use your calendar, photos, and social media to refresh your memory.

The highlights:

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The lowlights:

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Step 2: Goals

Did you set goals for this past quarter? Add them here and review each. Completed a goal? Fantastic! Note that here, along with what you learned. Failed to complete it? Jot down briefly what went wrong.

Step 3: Categories

*Now look back on the past quarter using whatever categories make sense for you. Here's the list I'm using: **Work, Partner and home life, Wider family, Friends, Health, Spiritual life, Skills, Side projects, Fun, Giving, Quitting, Money – Income, and Money – Savings.** For each category, what did you do? What didn't you do? What went well? Where did you slip up?*

Take your time.

- Work
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Back to the top

Now that you've completed steps 1 through 3, you have a fantastic basis for deciding what you want to focus on in the next three months. You'll find the final step, step 4, at the top of this document. Fill that in, and you've got a great start for the months to come!