



QUARTERLY REVIEW (LEADERS/TEAMS)

Look back to move forward. Take some time to review all that's happened over the course of the last three months on your team — the wins, the setbacks, new opportunities, and lessons learned — and use that to inform what's next.

For this process you'll want to pull up both your yearly goals and quarterly objectives so you can take note of where you started the year and where you started the quarter. This allows you to calibrate your measuring stick and ensure that your evaluations will be accurate. It also helps you analyze your growth more efficiently.

If you're at the start of the year, you might want to use the questions below to review not just your last quarter but the full year. Make sure to have any quarterly reviews and/or metrics from last year on hand.

1. What were your major wins? What good things did the last quarter catalyze for your team?

2. What were your major setbacks or challenges? What challenges did your team encounter in the last quarter?

3. What projects emerged and what got displaced last quarter? Were these connected to new opportunities or challenges?

4. What insights or changes need to be brought into this next quarter? Did any team patterns appear that need to be appreciated or dealt with?



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5. What are your growth edges? Based on what happened last quarter/year, where do you feel there is room for growth on your team?

6. Where are you stuck? What have been the places of stagnation or strategic uncertainty on your team?

7. What type of energy does your team typically have during this time of year? What types of projects might honor that energy this quarter?

QUARTERLY PROJECTS

List up to three projects you want your team to move forward this coming quarter.

1.

2.

3.