

Big Picture Planner

Use this template to map out your biggest goals for the year and plan them out by quarter. Use the next page to identify actions and next steps and write down events and key dates to remember, as you plan for the year ahead.

If you need more tips, skip to page 3 first.

Q1

Q2

Q3

Q4

Big Picture Planner

✓ Actions & Next Steps

Q1

Q2

Q3

Q4

Events & Key Dates To Remember

How To Use This Worksheet

Step 1: Identify your top level goals.

These could be anything, from launching a new product to rebranding your business to taking some much-needed time off. Don't be afraid to make a long list before narrowing it down to your most important objectives.

Step 2: Map your goals out quarter by quarter.

You may want to focus on one BIG goal to achieve by the end of the year, which you can break down into four smaller milestones to help you get there. Or you may choose to focus on four or more completely different objectives for each quarter. Whichever you choose, make sure that your goals are realistic within the timeframe you have set for yourself. Now map your goals in page 1 of your planning worksheet.

Step 3: Brainstorm activities to achieve your goals.

What are some of the tactics you can use to reach your goals? What resources will you need along the way? Think broad and remember, this doesn't have to be set in stone. The purpose of this exercise is to get you going and to start thinking a bit ahead, so you can put in place what's needed to get there. Use page 2 of your sheet.

Step 4: Highlight events and key dates for the year.

Write down major milestones that you won't want to miss. You may not be able to plan a year's worth of events but you can start by slotting in anything that you know will be important, like a major sales holiday, a target launch date for a new collection or a deadline to apply for an event and so forth. Getting visibility early of important dates helps you plan around them and avoid overscheduling or missing key opportunities. Look back at page 1 and see how key dates and events fit in with your goal mapping and adjust as necessary.

Step 5: Review your plan.

Share your plan with your team or a trusted mentor or friend to gather feedback and more input. Your plan should feel challenging - but not impossible. We like to call it "reasonable and feasible". This keeps it fun and motivating, instead of feeling overwhelming before you've even started (the killer of all best laid plans).