# Quarterly Check-In Framework

## Purpose:

- Evaluate progress toward goals.
- Reflect on successes and challenges.
- Re-align priorities for the next quarter.

## Quarterly Check-In Questionnaire

### 1. Review Progress (Looking Back)

Reflection Questions:

- What goals did I achieve this quarter?
- What contributed to my success, and how can I replicate it?
- What goals did I struggle with, and why?

Key Metrics by Area:

1. Health:
 - Weight lost: \_\_\_\_\_\_\_ kg
 - Activity consistency (e.g., weekly walks/swims): \_\_\_\_\_\_\_
 - Diet adherence: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. Finances:
 - Goal 1: \_\_\_\_\_\_\_
 - Goal 2: \_\_\_\_\_\_\_
 - Investment consistency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. Career:
 - Objective 1: \_\_\_\_\_\_\_
 - Objective 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
 - Objective 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. Relationships:
 - Family time consistency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
 - Networking opportunities attended: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. Personal Growth:
 - Books read: \_\_\_\_\_\_\_
 - Language learning progress: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
 - Skills developed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6. Mindfulness/Leisure:
 - Meditation streak: \_\_\_\_\_\_\_ days
 - Time spent on hobbies/wellness activities: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 2. Evaluate Current Standing (Present Assessment)

Reflection Questions:

- Are my activities aligned with my long-term vision?
- Have any new opportunities or challenges emerged?
- Am I maintaining balance across all areas of life?

Traffic Light System:

- Green: On track.
- Yellow: Needs attention.
- Red: Off track—requires immediate action.

Current Status by Area:

|  |  |  |
| --- | --- | --- |
| Area | Status | Notes |
| Health | Green/Yellow/Red | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Finances | Green/Yellow/Red | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Career/Work | Green/Yellow/Red | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Relationships | Green/Yellow/Red | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Personal Growth | Green/Yellow/Red | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Mindfulness/Leisure | Green/Yellow/Red | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

### 3. Plan Ahead (Looking Forward)

Reprioritize:

- What areas require more focus in the next quarter? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Next-Quarter Milestones:

- Health: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
- Finances: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
- Career: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
- Relationships: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
- Personal Growth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
- Mindfulness/Leisure: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Action Items:

- Schedule tasks for Q2 in Trello or calendar.
- Update tools (e.g., budget tracker, fitness logs, Trello boards) to reflect changes.

## Summary Template

1. Achievements:
 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. Challenges:
 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. Adjustments:
 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. Next Steps:
 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_