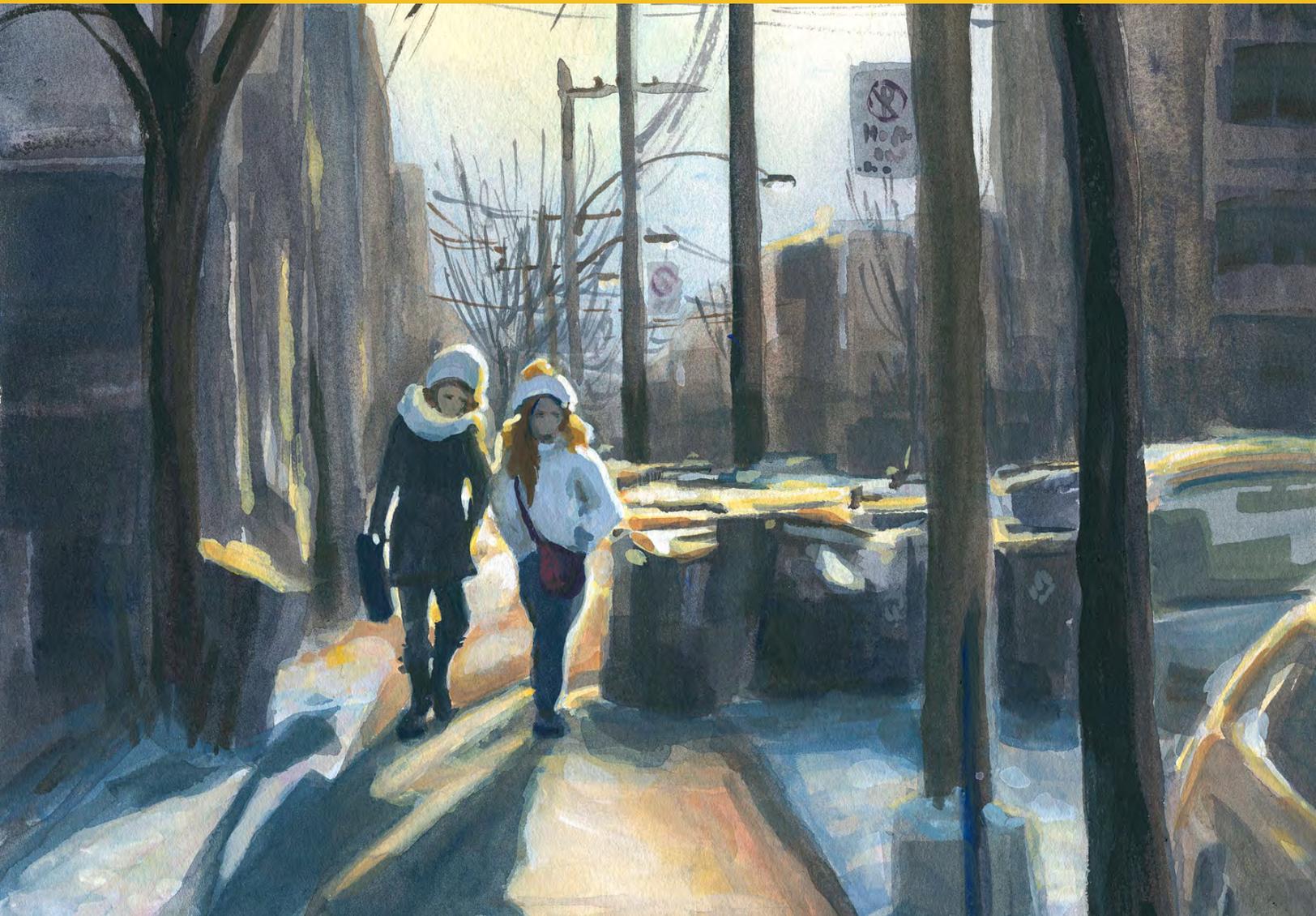


Painted Stories

QUARTERLY SUMMITS

A MORE MANAGEABLE AND
EFFECTIVE WAY TO SET GOALS



WHY QUARTERLY SUMMITS ARE SO EFFECTIVE

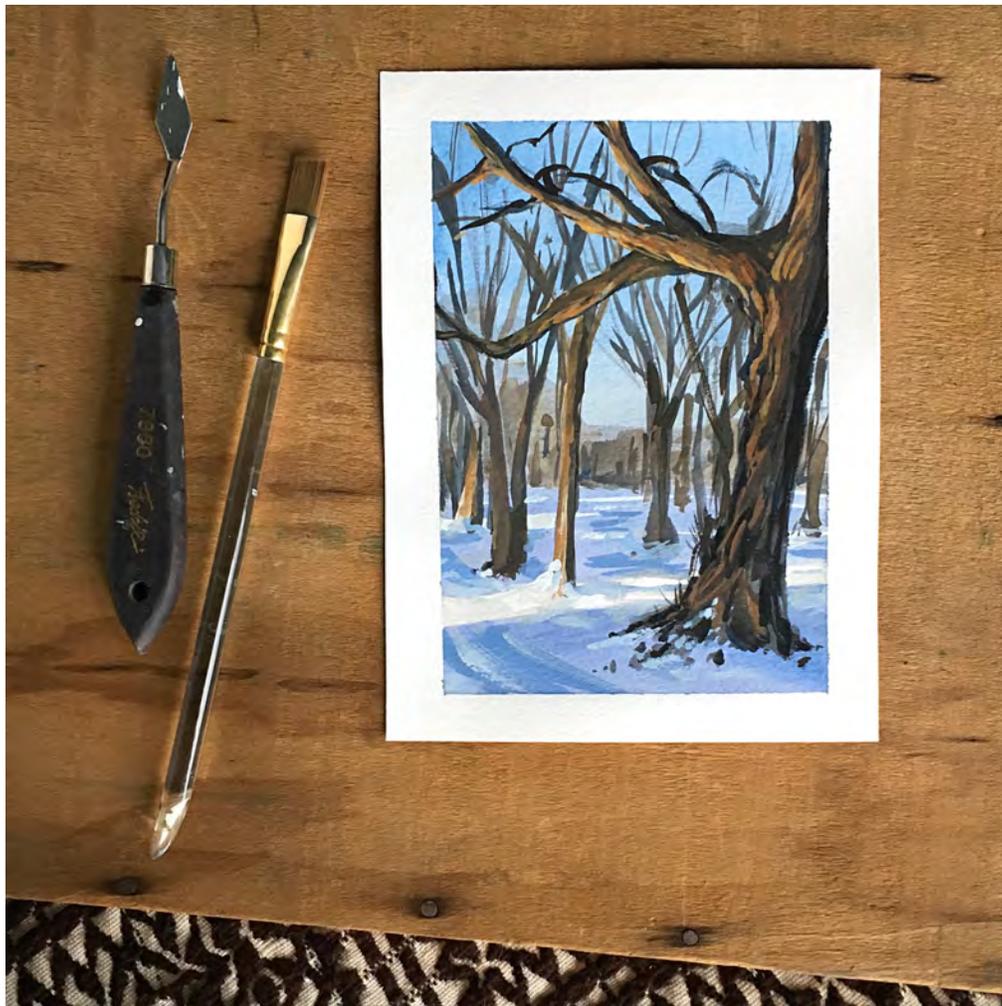
Setting smaller goals, more often, creates momentum that carries you forward. Each quarter is like a new year. You take stock, reset, and create new horizons. A quarterly pace allows you to pivot and adjust as you go while still having enough time and focus to achieve your goals. Setting goals each quarter gives a new burst of energy and allows you to set a smaller number of goals that are both more focussed, more manageable, and more likely to be accomplished.

Quarterly Summits are a very simple system for setting goals on a quarterly basis instead of an annual one. I have found them to bring an unprecedented level of focus and ability to take action in my life that has been very empowering.

During each quarterly session, you will **first look at the goals you set in the previous quarter, how you did** on them, **any struggles** you may have had, and **any learnings** you wish to take from those three months. Next, you will look at **what you currently have on the go**. Finally, you will set some **clear, manageable, and immediately actionable goals** for the upcoming quarter. Having a structure to follow helps the sessions be focussed and effective. It also prevents them from becoming too existential or overwhelming in scope.

The motivation behind setting goals is that you have **dreams, hopes, and desires** for **how you want to show up in your life** and **what you want to experience and accomplish**. Having an effective system for this helps you to live meaningfully and well.

You will learn much as you go. It is natural and expected that you will adapt these ideas and questions to what works best for you and your life. I hope that you feel excited, emboldened, and energized as you move toward you making your goals a reality!



*In a Quarterly Summit, you're looking back to the last quarter, taking stock of where you are at this moment, and then looking forward to where you want to go. It's all about **finding your own internal motivations and priorities** – and honouring them **by aligning your actions to them.***

QUARTERLY QUESTIONS

Purpose: Reflect on past quarter, big life changes & learnings, next steps.*

Treat this like any business meeting. Set a time and place ahead of the day, print out or set aside anything that you will need – journals, notes, calendars, etc. Pack a few pens, highlighters in several colours, and sheets of loose-leaf paper.

Typically, each set of questions takes about 30-45 minutes.

- 1. What did you do last quarter?**
 - What did you do over the last quarter? Where did the energy get spent?
 - Brief reflections/learnings on above
 - What worked? What didn't?
 - What were you most proud of? Most grateful for?
- 2. Where would you like to be after the next quarter?**
 - What are you already committed to?
 - What are your most important outcomes for the quarter? (1-3)
- 3. Discuss any issues, sticking points, big questions, or surprises that have surfaced.**
- 4. Develop your action plan.**
 - How can you get there? Brainstorm how to achieve...
 - Consider small steps to make part of your weekly routine
 - Any anticipated roadblocks? How can they be avoided or managed? **
 - Make a priorities list to help decide daily/weekly tasks

** It is helpful to summarize the purpose of each Quarterly Summit to remind yourself of the desired outcomes and keep yourself on track. Customize this to your own life-specific circumstances. These may be: selling a home, having a baby, changing jobs, travelling for your work, etc. They are big things that have a significant impact on the quarter as a whole.*

*** Having some strategies in place ahead of time can help you be more effective while taking action on your goals.*

ANNUAL QUESTIONS

Purpose: Reflect on the past year, celebrate your accomplishments, and begin to look at what's next in a big-picture way.

Treat this like any business meeting. Set a time and place ahead of the day, print out or set aside anything that you will need – journals, notes, calendars, etc. Pack a few pens, highlighters in several colours, and sheets of loose-leaf paper.

Typically, each set of questions takes about 45 minutes.

1. Looking back at the past year...

- What did you do over the past year? Where did the energy get spent?
- Brief reflections/learnings on above
- What worked? What didn't?
- What were you most proud of? Most grateful for?

2. Discuss both the main challenges and accomplishments of the year.

3. Reflecting on where you are at now...

- Consider how you feel about each main life area*:
 - (1) Health & Wellbeing
 - (2) Career
 - (3) Physical Environment
 - (4) Fun & Recreation
 - (5) Money & Finances
 - (6) Personal Growth
 - (7) Friends & Community
 - (8) Significant Other
- Are any areas doing particularly well?
- Do any areas need renewed attention?

4. Looking ahead to the next year...

- What do you want to eliminate or change?
- If helpful, try Stop, Start, Continue**
- What are the main things you would like to accomplish next year?
- What might your *word* or *theme* be for the upcoming year?

5. Discuss big picture ideas & any fears or anticipated difficulties.

* One helpful exercise I've come across for evaluating your life areas is to **create and fill out a life wheel**. To do this, draw a circle and divide it into eight. Each slice represents one of the above sections. Fill each piece of the wheel to the level you feel it is doing. For us visual folks, this can illustrate where your life may be feeling lopsided – both in terms of where things are going great, and where you may wish to focus some attention. Generally, having the roundest and fullest wheel is your ultimate goal!

** This is an exercise in which you ask yourself what you wish to **Stop** doing, what you'd like to **Start** doing, and what you want to **Continue** doing. For example, if something has been stressing you out, draining your energy, or causing you to feel badly all the time, it may be something you want to stop doing – or there may be something you can start doing that will help to fix it.

As the summits become a regular part of your routine, they become more efficient, requiring less effort & time to do.



Taking your Annual Review learnings forward to the Quarterly Summits:

You may wish to bring your notes from your Annual Review to your first Quarterly Summit. I tend to summarize the key points on a page in my pocket-sized journal which I bring to each summit throughout the year. This helps me to both remember the annual findings while not feeling burdened down, overwhelmed, or overly constrained by them.

With each of these summits, the process of asking yourself these questions and listening to the answers is as important as the actions that follow. In my experience, the findings tend to percolate in the back of your mind and have a real impact on the actions you take and the goals you set as you go. Many 'new' ideas can be traced back to this annual session in retrospect!



*Eventually, repeat goals become habits
and no longer need to be a focus of your energy and attention.
This can bring an amazing feeling of personal
accomplishment and satisfaction.*

FOR MORE TIPS: I've written posts about finding your guiding values and creating a vision story. These can be super helpful supporting exercises to the annual and quarterly summits process.

Knowing & Living Your Values

<http://www.paintedstories.co/blog/knowning-living-your-values-part-1-finding-your-values/>

Defining a Clear Vision for Your Life Path

<http://www.paintedstories.co/blog/creating-a-vision-story/>

Come on over to [Instagram](#) (@painted_stories) to share your creative and goal-setting process – you'd be a most welcome part of the conversation. Or, [read the Painted Stories blog](#) for reflections and tools to help you understand your own creative process and help you show up to do your best work. ♥



About Painted Stories

Painted Stories was founded by Michelle Darwin to create a rich and welcoming space for storytelling through hand-crafted images. Each artwork is carefully crafted to capture a remembered place or to celebrate a life story.

Michelle works with people who are looking for a custom painting of a special place – whether to remember and celebrate their personal or family history, or as a truly heartfelt gift for someone special.

Painted Stories

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