**LWQA episode 119**

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I'm your host. Dr. Katie lender. In this episode, I want to talk about quarterly strategic planning because this is something that I just completed on my winter retreat and I had a lot of people who are following Along on social media particularly Instagram stories, and they were seeing me do some content planning and some other things that I was sharing each day and I had several people reach out and just say, how are you doing this?

What does this look like? What is the process? So I thought I would talk a little bit about why you might do a quarter. Strategic planning process and then kind of a little bit about the how of what that looks like. So first of all, the why I think that mainly a big reason to do quarterly strategic planning is that you feel like a month is too short to be planning but a year feels too long and a quarter a three months is a really nice block of time that you're not planning too far in the future, but you are planning far enough that you feel like you can get get ahead of some things and so it's a really nice block of time.

And recently I've been reading a book called the 12-week Year. This is one of the book group books that we're going to be covering in prolific at the end of January and it's a way of looking at the year in quarterly chunks and trying to kind of set deadlines only three months ahead so that you feel kind of a sense of urgency and you move more projects through your pipeline.

Now, it's definitely a book meant to be for like a business perspective, but I do feel like it's relatively easy to translate into an academic perspective and I'll drop a link. That in the show notes in case it's interesting to you. The other reason why I think that quarterly strategic planning Works, especially well for academics is because we do have terms that change throughout the year.

So you don't necessarily have to pick the quarters as like January through March or April through June. If you wanted to you could just plan this around the quarters or the semesters of your year and try to do this for to take planning around that but I tend to like to break the year into four pieces and do it that way.

Another reason in addition to the terms changing is that seasons change and I've definitely found that I have different energy at different times of the year my workouts look different at different times of the year, and I was just thinking the other day when I was driving home and it was really dark how I just didn't have a lot of energy to get things done at the end of the day, but when I drive home in.

Spring and it's light out. I have a lot of energy to go run errands or work out at night or whatever and so because of those different changes throughout the year depending on the climate that you're in that might be another reason to kind of shift things around and think about your quarter in a different way.

And then the last reason I would say is I just did a post the other day about how planning is kind of a gift to your future self. And this is really the biggest reason why I do strategic planning each quarter is to try to really think ahead about what am I going to need during that time? And how can I pre prepare things or plan things in a way that I'm kind of alleviating some of the pressure from myself and I'll talk a little bit more about how I do that in the how part but.

I will also drop a link to that post in the show notes in case that's useful. So let's get into the how of doing this quarterly strategic planning and what it looks like. So first of all, I think why some people may not do this is it feels up really big like to just take on a bunch of different areas of your life and try to figure this out.

And so what I would recommend if you're just starting out with something like quarterly strategic planning is do it at the micro level pick like one area that you want to be strategic planning around and you can layer in other areas over time. This is a. Planning that I've been doing for a long time.

I've also mentioned on a previous episode. This is like one of my superpowers to do strategic planning. So this comes very easily to me, but for people that it doesn't come easily to starting small starting with one thing is I think really helpful. So here's some examples of what you could do at the micro level in terms of your plan.

You could do something like social media posting. If you are someone who post regularly on social media doing some planning ahead for that or prepping some images ahead of time or things like that. You could do this around travel if you're entering into a really heavy travel period starting to prep, you know, your files or the kinds of things, you know, you're going to need to take with you your presentation documents and things like that ahead of time.

You could also do this with things like meal planning. If you are on, you know, a relatively strict diet of some kind or you have your trying to eat more healthily in the new year, you know, you could kind of do some of this prep ahead of time and do like freezer meal. I look at meal planning in particular when I'm about to do heavy travel because I don't want to come back from that travel and not have anything to eat in my fridge and I also don't want to get busy around that time and just totally drop off and eat things.

That aren't very healthy. If you have kids like you this is something you could definitely do around like the kids activities and trying to figure out travel schedules or other things. You might need to coordinate with other parents. So this would work well for that it also of course works well around things like your publication strategy.

Teaching if you have certain classes you're trying to prep things for so there's all kinds of like subcategories that you could do the strategic planning with and when I was doing it over my break, I was primarily doing it with my business so that I could try to prep as much as I could. So that in the first quarter of the year, I had some things kind of on autopilot and I was able to really give the majority of my time in the business to my clients.

I don't want to be constantly stressing about what I'm supposed to be posting on social media or how I'm supposed to be marketing something or whether I'm supposed to be marketing something. I wanted all of that really figured out and I also know that during this first quarter of the year. I've got a pretty busy travel schedule particularly towards the end.

And so I wanted to make sure that I was kind of thinking ahead for that as well. So the first thing that I recommend once you pick your kind of subcategory or more than one that you want to look at is to look for pain points that you've had in the past. So what are the things that you wish you could fix about that particular thing?

So for example, I think that when it comes to social media for me at least doing it in batches is more efficient than just me trying to figure out every day at what I want to post and it's easier for me to create a bunch of images for Instagram and schedule them ahead of time and also to write the captions for those into my scheduler on my computer not try to type it into my phone in the moment.

I know that that's going to be more efficient for me to do that. I also know it's really helpful for me to have a list of possible content of what I might cover on the podcast or the blog now. I do schedule it into a calendar, but then I kind of like move it around depending on what I feel like talking about in any given time but I do have a running list of the kinds of things that I want to be talking about and this also includes as you saw in the past couple of episodes.

New products or new services that I'm releasing to make sure that people know about those things in a timely way. So I have a lot of things that have to do with scheduling when it comes to my business and it's helpful for me to be able to think about some of those things ahead of time. Now another thing that was really useful for me to think about over the break and I actually engaged a consultant to help me think through this so that I had a thinking partner was when I needed to Market certain things throughout the year and one of the reasons I did this is because I'm in addition to focusing on marketing a little bit more in my business this year and I did talk about that in my goals episode.

I want to kind of think about how I can do some of that marketing work ahead of time because it is hard. To do it is something that I feel self-conscious about when I marketing new products and it's a lot easier for me to write a bunch of those posts ahead of time schedule them and not have to like click the send button in the moment and to really think kind of carefully and thoughtfully about how I want to Market a particular product.

So doing all of that work ahead of time alleviates a lot of the pain points for me of trying to do it in real time. So another way to think about this aside from Pain points is just to look at your current schedule and try to think about what you would appreciate planning ahead for to make your life easier.

So one example of this is what I was planning for quarter one and in particular for social media, I realized that at the very end of quarter one. I have a lot of travel and it happens. Back-to-back. I'm actually flying from like one city to another city before I come home and there's very little time in between the trips.

And when I looked at that schedule, I thought you know, if I'm going to do another round of strategic planning at the end of March for April May and June. I'm actually going to kind of struggle in doing that a little bit because I love this travel schedule. And I knew that one of the things I was going to want to do for April May and June was to plan out a little bit more social media.

So what that caused me to decide to do was to actually plan on my social media for the first four months of the year taking into account my travel schedule so that I could get some of that done ahead of time and feel a lot better about it. Now you may be thinking well planning for an entire three months is a lot like you may not be able to do it all in a weekend or in a day or in a three-hour session.

I completely agree with this. So the other thing that I have done and I've kind of like segmented things out throughout the quarter period it's really just about planning them. It's not always about doing them. So I have all of my Instagram posts for January scheduled drafted and put into my social media.

Our but I haven't yet drafted the ones for February for March or April and I know that I'm going to have to do that at the end of each month. And so I blocked it into my calendar as a task so that I can kind of keep up with it. So I'm planning some of these things ahead. For an entire quarter. I'm planning other things ahead for about a month and then I'm planning other things ahead by like a week.

So it allows you to kind of segment the things that you have in your calendar in your schedule to think about. When are you actually going to have time to do those things and to plan them and I always put that kind of stuff into my planner so that I can kind of look ahead and see what are the moving pieces in terms of what time I have available to me.

But by being able to schedule a lot of this stuff ahead of time and kind of automate it it's allowed me to literally every day. I already know it's supposed to go out. I click a button it goes into Instagram and it posts it takes me about two seconds every morning and it also kind of makes sure and holds me accountable to being consistent with posting in that platform, which is something else that I really wanted to do this year.

And I don't always post regularly in my Instagram feed although I typically post regularly in my stories and so I. Wanted to get back to posting in that feed so you can see that some of the strategic planning is also around trying to figure out what are the things that you want to build into your life in terms of them being habits or other kinds of things that you want to do with more regularity.

So the other way to think about this is. To consider what you want to have done at the end of each month. If you're planning for larger projects. Now, you can hear from the kind of planning. I was doing that. There are things that I'm trying to plan for that happen with some regularity and it's pretty consistent.

And so I'm really just trying to get ahead of doing some of that and I'm trying to pre-draft things like blog posts and stuff like that so that I'm really clearing out time during my week and particularly during my morning hours what I want to be working out. And my after work hours when I don't want to be doing anything and trying to also alleviate some of that time I have on the weekends when I need to be doing some other client.

But you can also think about this in terms of Publications and what you have on your plate and if you want to take a larger project like a book or an article and think about well if I want to have this thing done or I want to make a pretty significant progress on it by the end of this quarter. What are the kinds of things that I would have to have done at the end of January?

What are the kinds of things that I would have to have done at the end of February or March and it allows you to set some milestones and break projects down into smaller pieces. And that goes back to this idea of your planning. You're not necessarily executing everything all in a weekend before the quarter starts.

You're really just trying to piece out the things you will need to do and chunk them so that it feels more manageable. And so that you put these things into your calendar and you know where they're going to. And I was talking about this with someone the other day. So I've been watching at the Marie kondo Tidy Up series on Netflix which is all about decluttering and it's great.

I really love it. It's like, you know, I'm someone who loves to declutter and so it's been really fun to watch but one of the things I was thinking about was when you think about decluttering a lot of organization experts will tell you that everything needs to have a home and this is why a lot of things get cluttered is because they don't have a home.

And so it's the same with your calendar. You want to make sure that everything has a home in your calendar. Otherwise, you're going to start to feel a little bit cluttered in terms of your time or your energy or your schedule and you're not going to be able to be sure when things are going to be able to be done.

So this is another reason to kind of think about how you want to fit in these projects because you're going to feel a lot less stress if you know that you scheduled it in and you know that you're kind of on track in terms of hitting your milestones. So I mentioned kind of putting notes into your calendar to give yourself a little bit of a heads up about when things are coming.

But the other thing I like to do is to give myself lots of buffer time for when those notes are in my calendar. So if I know that I need to be preparing for a conference presentation, I might start doing that three weeks out from when I actually need to be done so that I have a lot of room if I need to move that around or if something comes up I'm not going to feel really stressed about it.

So those are just a few ideas of how you can do some quarterly strategic planning. As I mentioned. There are lots of different subcategories about how you can do this and I can say a lot of my coaching clients have actually been engaging in quarterly strategic planning and I think that it is something that can really help you to alleviate your stress because you can see how things are fitting.

It also helps you to look ahead a little bit and see what's coming around the corner and that's always helpful. Actually, if you're in a season where you have some unknowns and you're trying to kind of plan around that or you know, you have a big thing coming up like a move. I know my partner and I in this quarter are probably going to be renovating our kitchen which seems like it's going to be a pretty big deal.

So I'm going to want to clear out a lot of this other stuff that feels a little bit like clutter in my calendar so that I can devote time when I need to two other projects or just. I know that I'm going to be disrupted during this period And so having all this other stuff kind of figured out is going to help me to manage that disruption.

So, of course, I would love to hear if you are quarterly planning or if you have questions about quarterly strategic planning. You can always email me a contact a Katie lunar dot work or you can tweet to me at Katie double underscore lender, or you can connect with me on Instagram @ KT underscore Linder.

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