



Annual Accountability Planner

For High-Stakes Professionals

Calendar Year

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PERFORMANCE **UNDER PRESSURE**

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ANNUAL ACCOUNTABILITY PLANNER

This is a planning tool used to help active professionals at all levels set annual, quarterly, and monthly priorities. Planning of this sort is not complicated but is vital for staying in control of your responsibilities - both personal and professional - on a regular basis.

Over the course of the year, it is important to regularly check in on the goals you've set, and monitor your progress as you go along. Yes, things will come up that you didn't expect, but this should not prevent you from staying focused on what you've decided is important.

Annual Planning

It is recommended that this section be completed before your year begins. List your key goals and priorities for the year, and make sure you come back and review this page to hold yourself accountable. Check each item off as you complete it, then take a moment to reflect on the importance of the accomplishment. This is something too many of us forget to do, and it comes at a price.

Accomplishments are to be celebrated. If they are not, it deflates your sense of purpose and value.

Your primary goal is to accomplish EVERYTHING you've listed as a priority for the year. These should be things that are meaningful to you and/or your team. At the end of the year, they will become what made this year valuable and distinct from all others. Make it count!

Quarterly Planning

Similar to your annual planning, it is recommended that each quarter be planned prior to its beginning. Specific priorities from your annual plan can be transposed or assigned to a particular quarter. This helps you break your annual priorities into management chunks that can be addressed each quarter. If a new priority arises that you didn't foresee in your annual plan, you can add it to one of your quarters - but make sure you keep momentum building toward the completion of your annual priorities. Don't let new urgencies distract you.

Monthly Planning

As with the other sections, plan each month before it begins. You have more flexibility in your monthly planning in that you can add new business or to-do items requiring your attention. But, again, make sure you are using each month as a stepping-block for completing your annual priorities.

Additional Comments and Instructions

1. Carve out 30-60 undisturbed minutes to plan each quarter and month before they begin
2. Write out a monthly intention - a key focus that will make the month important to you
3. In your monthly planning, each line starts with ____ The line between the circles is where you will check off items you have completed. The right circle is to be filled in when you have acted on the item but are **waiting** for some action to be taken by someone else. The left circle is to be filled in if you did not complete the item but want to flag it for **review** at some later date.
4. At the end of each month, write out a monthly final reflection that captures what this month meant to you. This could be an idea, a success, or a learning experience.

ANNUAL PLANNING FOR _____

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QUARTERLY PLANNING

Prior to each quarter, establish a few key objectives that you intend to accomplish. Make sure you refer back to these objectives on a weekly basis to monitor

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