

A WORKING REVIEW OF YOUR BUSINESS

Quarterly Review Pack

Review what happened. Test what it means. Choose what to do next.

Use entries from the period you actually have. Twelve weeks gives a fuller record, but fewer entries can still support a limited review. Write the dates and gaps below.

Period reviewed

Missing weeks or records

01 Gather the record

PAGES 02-03

Read the entries before drawing a conclusion. Copy the planned action, actual result and date for each week. Include wins and changes caused by outside events.

02 Test the pattern

PAGE 04

Look for repeated facts, not a story you can force onto everything. Pick two examples that support a pattern and one that challenges it.

03 Choose what comes next

PAGES 05-06

Choose what to repeat, change or investigate next. A repeated difficulty does not automatically mean a personal failing or a need to buy coaching.

See a worked illustration on page 7

01 / GATHER THE RECORD / WEEKS 01-06

What happened each week?

Brief notes are enough. Use the date of the record, and mark any missing evidence. Keep longer notes with the original entry.

	Planned action	Actual result	Evidence, date or gap
01 WEEK			
02 WEEK			
03 WEEK			
04 WEEK			
05 WEEK			
06 WEEK			

01 / GATHER THE RECORD / WEEKS 07-12

What happened each week?

Brief notes are enough. Use the date of the record, and mark any missing evidence. Keep longer notes with the original entry.

	Planned action	Actual result	Evidence, date or gap
07 WEEK			
08 WEEK			
09 WEEK			
10 WEEK			
11 WEEK			
12 WEEK			

02 / TEST THE PATTERN

What does the record support?

Use the weekly notes to answer. An empty answer can identify what you need to find out.

01 What worked?

Where could it be repeated?

02 What keeps recurring?

Cite two dated entries that support the pattern.

03 What challenges that pattern?

Find an entry that contradicts it or suggests another explanation.

04 What kind of obstacle was it?

Information, capacity, timing, a dependency or a choice? What would distinguish them?

05 What have I concluded too quickly?

03 / CHOOSE WHAT COMES NEXT

Next quarter's questions

Keep questions that still help. Replace only those that no longer fit. Pick one or two from these sets; do not turn every weekly entry into a long questionnaire.

01 Customers

Which customer response changed what I believed?

Which promise did we keep especially well?

What do we still need to ask before changing the offer?

02 Money

Which change affected margin or cash, and what explains it?

What expense earned its place?

Which number needs checking before the next commitment?

03 Time and delivery

Which work produced a useful result with the least friction?

Where did a promised date slip, and why?

What can I simplify without making the customer experience worse?

04 Direction

What is working well enough to repeat?

Which assumption did the quarter disprove?

What will I try next, and what result would make me continue or stop?

My one or two questions for next quarter

03 / CHOOSE WHAT COMES NEXT

Make the next action checkable

Write an action you can return to. Leave the result open until you have checked it.

01 Repeat

One thing that worked, and where I will use it again.

02 Change

One action, owner and date.

03 Evidence

What result will tell me whether to continue, change or stop?

04 Outside help, if needed

The exact question, relevant records and person to contact.

05 Review

The date I will return, and the result I found.

WORKED ILLUSTRATION / FICTIONAL BUSINESS

A delay is not always a time problem

This example shows how the record can change the explanation. It is not a client result.

01 The record

A small service business recorded six weeks of estimates taking two days to send. Four notes blamed being busy. Two later entries showed that the owner was waiting for a supplier price.

02 The counterexample

The owner first suspected a time-management problem. Two estimates that did not need supplier input went out the same day.

03 The next action

Request a weekly supplier price list. Record the time from complete inputs to estimate sent. Check turnaround for the next five comparable requests.

04 The review

If turnaround remained slow after the missing-input delay was removed, examine the next step. Do not treat every delay as the same problem.

Continue with your own record

Use the weekly notebook to keep the next quarter's entries together.

Twelve-week notebook

Work with me