

# Quarterly Transition Checklist

**"A Clear Vision and Set of Goals  
Connected to Making a Difference in the World Engages  
and Aligns your Team  
Keeping Them Focused on  
What Matters Most"**

# QUARTERLY TRANSITION INSTRUCTIONS

CURRENT QTR \_\_\_\_\_ NEXT QTR \_\_\_\_\_

To be prepared for the Quarterly Transition Meeting, each person needs to take time to reflect on what went well in the Current Quarter and what needs to be focused on in the Next Quarter. This document gives each participant the opportunity to capture their responses and bring them to the Quarterly Transition Meeting.

The following process will be followed to complete the Quarterly Transition Meeting:

## 1. Set Next Quarter Vision (WEEK 7 Current Quarter)

Six to Seven weeks into the Current Quarter, everyone provides strong updates online on their Current Quarterly Goals. The President reviews the One Page Success Plan looking at the status of the Current Quarterly Goals and evaluates what will be accomplished by the end of the Current Quarter.

The President then projects themselves forward to the end of Next Quarter and answers the following questions:

- What are the quarterly goals that have been accomplished?
- What are the revenues and profits?
- Any new markets that the company went in to?
- What additional structure has been put in place?
- What awards has the company been nominated for?
- What impact has the company had in the community?
- How have employees been professionally and personally developed?
- What was the theme of the quarter?

The leader creates a set of bullet points or writes a set of sentences to describe what it will look and feel like to be in the company at the end of the the Next Quarter.

## 2. Share Next Quarter Vision (WEEK 8 Current Quarter)

The leader spends 15-20 minutes sharing the Next Quarter Vision with the Leadership Team and then opens it up for any questions or clarifications that are needed. Based on the discussion, the leader makes any revisions to the Next Quarter Vision.

## 3. Work on Next Quarter Goals (WEEKS 9-11 Current Quarter)

Over the next three weeks, each leader works with their employees on their team sharing the Next Quarter Vision. Their team uses that Vision to create three to five Next Quarter goals for their department prioritized from most to least important.

## 4. Quarterly Transition Meeting & Roll Out (WEEK 12)

The leadership team comes together to follow The Radix Group Quarterly Transition Meeting Agenda. Once the meeting is complete, enter all the Next Quarter goals on The Radix Group online and Roll Out to the entire company in the next All-Hands Meeting.

## REFLECT ON CURRENT QUARTER

Viewing the current One-Page Success Plan and the Accomplishments Section online might provide help in answering these questions.

### **1. What were our business successes from the Current Quarter?**

List the Goals that were met and the obstacles that were overcome.

### **2. What were our business failures/challenges from the Current Quarter?**

List the team failures including goals that weren't met and the challenges the team encountered. Identify any challenges that need to be addressed in the Next Quarter.

### **3. Evaluate how you performed vs the goals that you set.**

Looking at Current Quarter goals, identify what was completed and what wasn't completed.

**4. What Did We Learn in the Current Quarter?**

List the key learnings for you and for the team.

**5. What were your Top Three Memories of the Current Quarter?**

**6. What were the Top Three Recognitions of the Current Quarter?**

List at least three recognitions of people living the Values and bringing the Brand Purpose to life.

**7. What Structure did we Implement in the Current Quarter?**

Reflect on the people, policies/procedures, and tools that were put in place that are helping everyone to more efficiently and effectively deliver?

## VISION FOR SUCCESS NEXT QUARTER

Go through the following sections to start thinking about what success looks and feels like Next Quarter.

### 1. Next Quarter SWOT Analysis

Complete the following SWOT Analysis. You can look at the SWOT Analysis that is at the bottom of your One-Page Success Plan and see if any changes need to be made.



Additional Notes:



Additional Notes:



Additional Notes:



Additional Notes:

## 2. What Do We Need to Get Better at Next Quarter?

Looking at how the company is currently operating, what are the areas that need to get better in the next Quarter? I have provided four categories below to spark your thoughts and ideas.

**Leadership** – How can leadership and management be improved at the company? Includes planning, communicating, and training.

**People** – What work needs to be done to have 'A' Players in every position? This includes employee development plans and/or hiring.

**Sales** – What needs to happen to get more sales or more recurring revenue?

**Operations** – What needs to be improved to execute with discipline and deliver the products and services as promised?

### 3. Top Three to Five Next Quarter Goals

Looking at the progress to date on the Annual Goals on your One Page Success Plan, list what you think are the top three to five Quarterly Goals for your department prioritized from most to least important. Use the goal sheet at the end to further think through each quarterly goal.

1. Quarterly Goal #1 : \_\_\_\_\_
2. Quarterly Goal #2 : \_\_\_\_\_
3. Quarterly Goal #3 : \_\_\_\_\_
4. Quarterly Goal #4 : \_\_\_\_\_
5. Quarterly Goal #5 : \_\_\_\_\_

### 4. Learning and Professional Development

List the learning and professional development that needs to happen in your department and what you want to be trained on yourself.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**QUARTERLY GOAL SHEET**

Complete one sheet below for each Next Quarter goal identified.

GOAL NAME: \_\_\_\_\_

WHO IS RESPONSIBLE? \_\_\_\_\_

a. Define the Vision for Success (What impact will this goal will have?)

b. What Resources are Needed?

c. Identify the Key Metrics to Track.

d. Top Actions/Tasks Needed to Achieve the Goal.

e. Identify Potential Obstacles.