



GROWTH AND PLANNING

Quarterly agency planning pack

A quarterly planning pack for turning business goals, capacity, client commitments, financial needs, and operational improvements into a focused plan.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

A new quarter is approaching and the team needs shared priorities.

WORK THROUGH THE CHECKLIST

- ☐ 01 **Review the last quarter**

- ☐ 02 **Set outcomes**

- ☐ 03 **Check capacity**

- ☐ 04 **Plan client commitments**

- ☐ 05 **Choose operating improvements**

- ☐ 06 **Schedule the review rhythm**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.