

**CHART YOUR STARS**  
**QUARTERLY REVIEW**

## WELCOME TO YOUR QUARTERLY REVIEW!

This is a process I go through at the end of each quarter, to reassess where I am in my year-long plans and do the math required for my quarterly taxes + state sales tax forms. Even if you don't file quarterly, doing this now will make it SO much easier at the end of the year.

But if that's not enough reason, remember this: You have to know what's working to do more of it. In the daily grind of just running your business, it's hard to see the big picture. Taking a little time to spiral out and see it all will make you that much more effective, and bring you closer to your goals.

Before you get started, pull out your Chart Your Stars Guide from the beginning of the year. If you didn't fill it out, find a journal from the beginning of the year to refer to, or open up your blog...you're looking for some documentation of the dreams you had in January, so that you can reference them.

*Ready?*

Let's go!

## WORKING IT

In this section we'll review your days and your systems

### WHAT'S A TYPICAL DAY?

Below, list what a usual day of working in your biz looks like. If you have different kinds of days (admin days, dyeing days), make a different list for each kind of day. (If you work a day job (or night job!) just start your list wherever you start your work. If you only work on weekends, start there!)

What do you like about this?

What did you change about this last quarter?

How did that work?

What do you want to change in the coming quarter?

How do you currently track your gross and net income and expenses? (How often and using what?)

What do you like about this? *(If anything!)*

What do you want to change?

**REVISIT THE CHART YOUR STARS GUIDE:**

What new thing did you plan to track at the beginning of this year?

Did you start tracking it?

What did tracking these numbers this quarter teach you?

What new thing would you like to track?

(Craft show profits? Wholesale profits? Production? Words written per day or week? Newsletter subscribers?)

What new thing would you like to plan and schedule in a new way?

(expenses, production, shipping, daily or weekly projects, etc)

## WHAT DID YOU ACCOMPLISH LAST QUARTER?

(If you made a map or two, pull them out and check against your list of mile markers)

Include both big and little:

(Leave space under each one, and take up the next page too!)

Now go back and fill in under each item: how did you feel when you reached each of those accomplishments?

## LOOKING BACK AT YOUR LIST OF ACCOMPLISHMENTS

What surprised you?

(about how it happened, when it happened, results you weren't expecting)



## THE SECRET OF MY SUCCESS

Go back through your list of accomplishments and look for an underlying theme or lesson.

What was your secret?

What lessons did you learn about yourself last quarter?

What lessons did you learn about your business?

What specific lessons do you want to bring with you into the next quarter?

## GRATITUDE

List what you are/were grateful for right now.

(Write, draw, mindmap, collage)

## MONEY STUFF

### NOW IT'S TIME TO GET SPECIFIC!

Total up your sales and expenses for the quarter (if you're not sure how to get this info from Paypal, shoot me an email!) - doing this now will make your taxes SO much easier at the end of the year, AND it'll give you great information for what to do next.

#### What were your gross sales last quarter?

(The total money you took in, before fees and expenses. You can count anything you want to count - whatever seems like your business to you.)

### NOW, TAKE A MINUTE TO CELEBRATE THIS NUMBER!

Even if it looks teeny in comparison to what you wanted, if it's above \$0 you are already a success at building a business that makes something that people want to buy! Yay!

#### What were your total business expenses?

(Count whatever counts for you- supplies, fees, shipping, computer, website hosting)

#### What was your net income?

(Take the gross income and subtract the expenses)

Now label each income entry by product (you can be as specific or general as you want “yarn” or “sock weight yarn” or “Blue sock weight yarn”)

### **SORT BY PRODUCT AND TOTAL UP EACH PRODUCT'S SALES.**

What were your 3 best-selling products?

Does that surprise you? Tell you something?

What would you like to make this quarter?

(Whatever number you choose is perfect. It does not define you or your success. But having a specific goal will help you focus on what you want.)

How might that work?

(How many of what products would need to sell? How much would you make at that craft show or with wholesale accounts? Take every aspect of your business into account.)

What can you do to make that happen?

(Get specific! What real actions can you take?)

Now take a moment to look at everything you learned in the last quarter, about what felt good, what you accomplished and what sold well.

**What does this indicate?**

(Do you need to shift your focus towards your best-selling product? Do you need to change some prices? Cut expenses?)

**What do you want to accomplish in the upcoming quarter?**

(List everything)

**Pick one big, measurable goal you want to reach by the end of the quarter:**

Now, this is the goal you'll make a map for this quarter!

## CONGRATULATIONS!

You've just taken steps to make this your best quarter ever! You've learned from what is working in your business and you've focused in on what you can do in the coming months to continue the awesomeness.

The next step is to [make a map](#) to plot the specific tasks that will move you towards your goal, then take a few notes for your month (monthly planning logs are available [here](#)).

Happy travels,

**TARA**