Your Quarterly Planning Guide

Optional lessons matching the final Q4 planner.

Use a lesson when you need it. Pause and return without restarting.
Click a title below. Click the Liventi logo to return to this page.

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A1 Idea Bank

A2 Extra Writing

A3 Extra Dates

Cards 18-21 are for the quarter close. Appendices A1-A3 are optional.
A1 captures new ideas during Q4; Not Now holds plans deliberately deferred.

Print the separate planner. These lessons stay on screen. Extra Writing (A2) and Extra Dates (A3) provide more room when needed.

Worked example: from commitments to a first map, then a revised plan.

Where I Am Now

Help for card 01. Use only what helps.

WHY THIS PAGE EXISTS

A starting snapshot helps you choose a direction for the time left in Q4. No annual plan is needed.

HOW TO USE IT

Write what is happening, what works and what needs attention. Write as much or as little as you want; there is no required depth or length.

WHAT TO PAY ATTENTION TO

Use the printable to write and this guide only when you want help. You can pause between parts. At the end of a session, mark the card you want to return to. Monthly planning will bring you back to your Quarter Map.

EXAMPLE

A few honest phrases are enough: mornings feel rushed, work hours increased, shared dinners are working.

Where I’m Going

Help for card 02. Use only what helps.

WHY THIS PAGE EXISTS

The person you want to become helps you choose results that belong in your life. You do not need to redesign your whole future before planning Q4.

HOW TO USE IT

Use the questions to explore how you want to live and what you want your choices to support. A few words or a longer reflection are both welcome.

WHAT TO PAY ATTENTION TO

You do not need to define your whole identity or future. Keep the reflection as broad or specific as you want. The last question connects your direction to a change or something to protect this quarter.

EXAMPLE

“I want to be someone who makes room for creative work” can guide a portfolio goal. Its checkpoints and place in Q4 come later. You do not need a full annual plan first.

My Season of Life

Help for card 03. Use only what helps.

WHY THIS PAGE EXISTS

Different parts of life can need different things. You might be building at work while recovering your energy.

HOW TO USE IT

Mark all the seasons that fit and note the relevant area beside each. Add your own season if needed. Then name what you need more and less of, and what you can stop demanding from yourself.

WHAT TO PAY ATTENTION TO

You do not need one label for your whole life. Where needs conflict, let your real capacity guide the pace; growth in one area does not require growth everywhere.

EXAMPLE

Work: building. Health: recovering. You might develop one manageable project while protecting sleep and recovery.

Choose Your Life Areas

Help for card 04. Use only what helps.

WHY THIS PAGE EXISTS

The list is a starting point. Add another area if something important is missing.

HOW TO USE IT

Use the listed names or your own. Cross out areas that do not fit and neutral areas needing no extra attention. Consider the remaining areas, then choose up to four.

WHAT TO PAY ATTENTION TO

Neutral does not mean unimportant. Keep a joyful area if you want to care for it. The remaining areas are candidates, not commitments.

EXAMPLE

You might use Family, My children or Parenting - whichever name is useful to you. A neutral area can remain outside this plan. A joyful area can stay if you want to care for it.

Life Wheel - Start

Help for card 05. Use only what helps.

WHY THIS PAGE EXISTS

A number is one way to reflect, not a requirement. Words can show the good, the painful and the changes you want within each selected area.

HOW TO USE IT

Bring your area names from Planner 04/21 into the numbered description spaces. Write a few honest sentences for each. Use the questions beside the wheel as prompts, not a checklist. If a score helps, shade the matching quarter-circle from the center outward.

WHAT TO PAY ATTENTION TO

The score is optional. Use the same numbered positions when you return at the end of Q4. Leave unused areas blank. Next, explore connections on card 06 if useful, or go directly to priorities on card 07.

EXAMPLE

My children: “Bedtime feels close and happy. Mornings leave me tense and short with them. I want less rushing without losing our evening time.” This tells you something a number alone could not.

How My Areas Affect Each Other

Help for card 06. Use only what helps.

WHY THIS PAGE EXISTS

Use this page if it helps you choose a priority. Otherwise, move on. A change in one area may affect others.

HOW TO USE IT

Write the same short area names along the top and down the left of the matrix. Read across a row: if the area on the left improved, what might change in the area above the column? Fill only connections that matter to your choice.

WHAT TO PAY ATTENTION TO

Skip shaded diagonal cells and any unused rows or columns. A short phrase is enough, but you can use extra writing space. Notice possible help and possible costs. A connected area is not automatically the best priority.

EXAMPLE

Row Work, column Health: fewer evening shifts could leave more recovery time. Row Health, column Work: better recovery might make work more manageable. These are different directions; explore either only if useful.

What Matters Now

Help for card 07. Use only what helps.

WHY THIS PAGE EXISTS

Priorities guide what gets your attention when time or energy is limited. Goals are specific results chosen to support them.

HOW TO USE IT

Choose a main focus for the quarter and say why it matters. Add up to three other priorities if useful. Use your areas and any connections you explored.

WHAT TO PAY ATTENTION TO

A priority can need space, care or a boundary without a goal. Card 10 connects priorities to areas and goals; a main goal is a larger commitment you choose to develop, not a rule that other things cannot be done.

EXAMPLE

Area: Home. Priority: calmer mornings with the children. Goal: create a working place for bags, shoes and things needed for leaving. Reorganising the entire home would be a different scope; choose what serves the priority.

Not Now

Help for card 08. Use only what helps.

WHY THIS PAGE EXISTS

Not Now holds known possibilities you are not choosing for Q4. It’s not mine anymore releases expectations or goals you no longer want.

HOW TO USE IT

Use Not Now for plans you have considered but are deliberately postponing. Use It’s not mine anymore for what you no longer want. New ideas that arise during Q4 go in Appendix A1: Idea Bank; you do not need to fill that page while planning.

WHAT TO PAY ATTENTION TO

When a new idea calls for your attention, ask whether it supports your direction. If you choose to add it now, decide what gets smaller or waits. Something new should not silently become another demand.

EXAMPLE

You still want to take a course, but choose not to begin it this quarter: Not Now. A qualification no longer supports the life you want: It’s not mine anymore. An ongoing commitment you want to stop belongs on Make Room, card 09.

Make Room for What Matters

Help for card 09. Use only what helps.

WHY THIS PAGE EXISTS

Your plan needs space in the life you already have. This page turns sources of strain into decisions, rather than making another list of problems.

HOW TO USE IT

Choose a few things that cost more time, attention or energy than you want to give them. Decide whether to stop, pause, finish and close, close without finishing, or remove them. Say what the decision protects.

WHAT TO PAY ATTENTION TO

You do not have to finish a project to close it. Rest and pleasure are not problems to eliminate. Not Now holds things you are not choosing; this page changes what is already taking space. No need to copy an item onto both.

EXAMPLE

“An abandoned project - close without finishing - protect attention for the work I still want.” Or: “One optional commitment - pause - protect energy during a busy month.”

My Areas, Priorities & Goals

Help for card 10. Use only what helps.

WHY THIS PAGE EXISTS

One table shows how areas, priorities and goals fit together.

HOW TO USE IT

Write up to four life areas, then a priority under each. Add up to two goals per area where useful. In each filled goal box choose MAIN or SIDE GOAL. For MAIN, circle number 1, 2 or 3. Use each number once across the whole table. You may place two main goals in one area.

WHAT TO PAY ATTENTION TO

Choose no more than three main goals in total. These receive detail on cards 11-12. Tick SIDE GOAL for smaller goals; their names go in the Side Goals row of the month map (15). They still take time and energy. A priority can remain without a goal. Empty fields are welcome.

EXAMPLE

Home: calmer daily life. Main goal 1: a working entrance area for school mornings. Side goal: clear the cellar. Work: show what I can offer. Main goal 2: finish a portfolio. Family: protect time together; no project goal is needed.

My Three Main Goals

Help for card 11. Use only what helps.

WHY THIS PAGE EXISTS

The three main goals receive detail in one shared table, with a reduced option kept beside each goal.

HOW TO USE IT

Use the main goal numbers circled on card 10. Record the priority, desired result, why it matters and how you will recognise completion. Develop only MAIN goals. Leave unused columns blank.

WHAT TO PAY ATTENTION TO

Leave My Minimum blank until you finish card 16. Then return and choose a smaller useful version of an existing goal, or write that you will pause it if capacity drops. This is not a second set of commitments.

EXAMPLE

Goal: finish three portfolio case studies by the end of Q4. Done: three case studies ready to publish. Minimum, after checking the plan: one finished case study. For another goal, the reduced plan might be to pause it entirely.

Milestones

Help for card 12. Use only what helps.

WHY THIS PAGE EXISTS

Milestones are recognisable states of progress, not lists of actions.

HOW TO USE IT

Use main goal numbers 1, 2 and 3 from card 11. Follow the path from your starting point through useful milestones to the result. Use fewer than three milestones, or none, when they do not help.

WHAT TO PAY ATTENTION TO

Tasks describe actions. Habits support goals that benefit from repetition; not every goal needs a habit. Detailed tasks and habits belong to later planning levels.

EXAMPLE

Goal: a safe, usable child’s room. Start: an empty, unpainted room. Milestone: walls painted. Next milestone: furniture assembled and in place. Tasks such as buying paint or protecting the floor are actions leading to a milestone; they are not entered as milestones here.

Does This Plan Fit My Life?

Help for card 13. Use only what helps.

WHY THIS PAGE EXISTS

The reality check identifies existing limits, available capacity and the buffer your life needs.

HOW TO USE IT

Open your calendar and look at your Season of Life on card 03. Notice fixed commitments, heavier periods and experiences you tend to underestimate. These are inputs for the month map, not a demand to change the plan yet.

WHAT TO PAY ATTENTION TO

Extra space means time or energy left available for delays, recovery or unexpected demands. It need not be a fixed percentage. Use something similar you have done before as a reference. The whole-plan check happens on card 16.

EXAMPLE

A trip may use more than its travel dates: preparation and recovery also need room. If earlier projects slowed during busy work periods, use that experience when placing milestones. See the worked example at the end of this guide.

What Already Needs Room?

Help for card 14. Use only what helps.

WHY THIS PAGE EXISTS

This card makes your existing commitments visible across the quarter before you place your own goals.

HOW TO USE IT

Record only events, periods and external deadlines that affect your quarter. Then describe what space remains for your own goals in each month.

WHAT TO PAY ATTENTION TO

You do not need to count every hour or copy your whole calendar. Blank dates do not automatically mean available energy. “One small stage; keep the rest open” is a valid description. See the worked example at the end.

EXAMPLE

December includes a family trip and a fixed work deadline. Note both, then allow a lighter project load. A calendar with blank days can still contain demanding responsibilities.

Quarter Map: Main & Side Goals

Help for card 15. Use only what helps.

WHY THIS PAGE EXISTS

The map lets you see each goal’s stages, timing and endpoint together.

HOW TO USE IT

Place main goal milestones or outcomes across the months, one goal per row. Copy each main goal completion criterion from card 11 into the final column. In Side Goals, enter the short names of smaller goals in the relevant months.

WHAT TO PAY ATTENTION TO

The dash in the last cell of Side Goals means there is no single shared completion criterion for that row. Side goals still count toward the load. Leave unused months or goals blank; the monthly planner returns to each month’s column.

EXAMPLE

Main goal 1: a working entrance area. October: layout chosen. November: storage in place and tested on school mornings. Done: everyday items have usable homes. Side goals in October: clear the cellar. That job still needs room alongside the main goal.

Does My Quarter Fit Together?

Help for card 16. Use only what helps.

WHY THIS PAGE EXISTS

This card brings the calendar and Quarter Map together so you can see whether your goals share more time or energy than you have.

HOW TO USE IT

Place commitments (14) and the Quarter Map (15) beside this page. Give selected outcomes a date or range only when useful. Mark the type: an external Deadline, your own Target, or a progress Check.

WHAT TO PAY ATTENTION TO

Check commitments, main goals and side goals together. If the plan fits, keep it. If not, update the map and affected dates. Use the dependency section only when one outcome depends on another. New ideas belong in the Idea Bank (Appendix A1). Finally return to My Minimum on card 11 and choose a smaller result or pause option for your main goals.

EXAMPLE

If furniture delivery moves from November 5 to November 19, assembly and the room-ready target may move too. Record the dependency and update the map if it changes the month. If your plan already fits, keep it. Extra date rows are at the end of the printable. Use Appendix A3: Extra Dates if you need more date rows.

A Letter to My December 31 Self

Help for card 17. Use only what helps.

WHY THIS PAGE EXISTS

After planning, you can preserve how this moment feels: what is difficult, what brings joy and what you hope the remaining quarter will hold.

HOW TO USE IT

If you want to write a letter, date it and address your December 31 self. Use only the prompts that help. Include something kind, specific and believable for the road ahead.

WHAT TO PAY ATTENTION TO

Write after planning. The letter preserves your personal context, hopes and concerns. Return around December 31 and answer on card 20. All prompts are optional; write as much or as little as you want.

EXAMPLE

“I’m relieved that I chose one project. I’m still worried about money, and dinners together are making me happy. I believe in you. If things change, remember why we made this choice.”

What Actually Happened?

Help for card 18. Use only what helps.

WHY THIS PAGE EXISTS

The review turns experience into useful information. It is not a productivity grade.

HOW TO USE IT

Look at your goals and describe what you completed, what you did not, and what you consciously chose not to do. Then notice what worked, what changed and what the quarter taught you.

WHAT TO PAY ATTENTION TO

An unfinished result can reflect a changed priority, a poor estimate or a real limit. Use the next page to decide what comes with you, what changes and what stays behind.

EXAMPLE

“I finished one room, not two. Reducing the scope helped. I learned to check delivery times earlier. Next quarter I will leave more room between dependent stages.”

What Stays, What Changes

Help for card 19. Use only what helps.

WHY THIS PAGE EXISTS

Closing a quarter means deciding what still belongs in your life. An old written goal does not have to become a new obligation.

HOW TO USE IT

Look back at the goals and what actually happened. Use Continue for what works, Carry for unfinished work that still matters, Change for a wanted outcome needing a different approach, and It’s not mine anymore for what no longer fits.

WHAT TO PAY ATTENTION TO

Carry does not mean automatically copying every unfinished thing into the next quarter. Return to Appendix A1: Idea Bank and review any ideas you recorded. Complete its decision columns where useful; you do not need another list.

EXAMPLE

A qualification still matters but needs more time: Carry. The qualification matters, but the evening course no longer fits: Change. The career it served no longer interests you: It’s not mine anymore.

A Reply to My Starting Self

Help for card 20. Use only what helps.

WHY THIS PAGE EXISTS

The letter holds what you knew and felt when you started. Answering it lets you describe what that earlier version of you could not have known.

HOW TO USE IT

Read your earlier letter on card 17. Use the quarter review for facts, then write what those experiences mean to you now. You can follow the prompts or write freely.

WHAT TO PAY ATTENTION TO

This is not a second report of completed goals. It is a response to the person who made the plan. If you skipped the earlier letter, you may skip this too; there is nothing to catch up.

EXAMPLE

“You thought the move would be the hard part. Settling in took longer. I finished less work, but we feel at home now. You couldn’t have known how much that would matter.”

Life Wheel - End

Help for card 21. Use only what helps.

WHY THIS PAGE EXISTS

Your starting descriptions hold details a score cannot. Comparing them with today can reveal relief, joy, trade-offs and changes in what matters.

HOW TO USE IT

Use the same areas and numbered positions as Planner 05/21. Write a current description for each, using whichever side prompts help. Add a score only if useful. Place both pages together and compare the words as well as any scores.

WHAT TO PAY ATTENTION TO

You do not need a larger or more even wheel. If an area is no longer yours, explain that rather than replacing it with a new category and comparing the numbers. If you skipped the first wheel, you can use this as a snapshot or skip the comparison.

EXAMPLE

At the start: “Mornings feel tense; evenings together are good.” Now: “Mornings are calmer and we still have that time together.” The meaningful change is clear even without a number.

Idea Bank

Optional support. Use when needed.

WHY THIS PAGE EXISTS

Ideas can wait, but some opportunities deserve a decision now.

HOW TO USE IT

Use Appendix A1 during the quarter for new ideas as they arise. You do not need to fill it during initial planning. Write the date and idea. Leave its decision blank until ready, then choose Now, Next quarter, Later or It’s not mine anymore and add the decision date.

WHAT TO PAY ATTENTION TO

To choose Now, place cards 14-16 beside the bank. Compare existing commitments, the month map and key dates. Decide what becomes smaller, moves or leaves the plan. If this changes a goal, update that goal, its milestones and any affected minimum as well.

EXAMPLE

A November workshop becomes available. You decide it matters now, move a portfolio milestone to December and record both the choice and the trade-off in the bank. The bank holds the decision; the map shows the updated plan.

Extra Writing

Optional support. Use when needed.

WHY THIS PAGE EXISTS

Sometimes the useful answer needs more room. This sheet lets the original exercise stay spacious without cutting your thoughts short.

HOW TO USE IT

Write the original planner page number and a short topic at the top. Continue your answer here. Clip the sheet to that page or place it directly after it. Print another copy whenever needed.

WHAT TO PAY ATTENTION TO

This is extra space, not another exercise to complete. You can use it for a longer description, a letter or context worth keeping. Do not feel obliged to use every line.

EXAMPLE

For a longer description of My children, write “05/21 - My children” at the top, continue the description and place this sheet after your starting Life Wheel.

Extra Dates

Optional support. Use when needed.

WHY THIS PAGE EXISTS

Some quarters need more date rows than card 16 provides. Appendix A3 continues the same check without crowding the main card.

HOW TO USE IT

Use this appendix only when needed. Add the goal or outcome, date or range and type: external Deadline, your own Target, or a progress Check. Keep it beside card 16.

WHAT TO PAY ATTENTION TO

Dates are useful when they support a decision. You do not need a deadline for every goal. Check extra dates against commitments on card 14 and the map on card 15; update the map if timing changes.

EXAMPLE

A delivery date, a room-ready target and a portfolio review can each have a row. If one moves and affects another, record the dependency on card 16.

From Commitments to a First Map

Example only. Your goals and available space will be different.

14 / EXISTING COMMITMENTS

OCTOBER	NOVEMBER	DECEMBER
Normal work schedule. Room for one project stage and a small side goal.	Work deadline: November 20. Less energy available; keep project work light.	Family trip: December 20-28. Finish key work earlier; leave travel time open.

15 / FIRST PLACEMENT - READY TO CHECK

GOAL	OCTOBER	NOVEMBER	DECEMBER	DONE
★1 Child’s room	Walls painted	Furniture assembled; room ready		Safe, usable room
★2 Portfolio	Material selected	Three case studies finished		Three publishable case studies
SIDE GOALS	Clear the cellar			-

What stands out? November has less space, but both main goals ask for substantial progress there.

Check the Load, Then Adjust

Example only. Your goals and available space will be different.

16 / THE DECISION

November's work deadline competes with finishing the room and three case studies. Keep the room goal. Move portfolio work to December and reduce its quarterly scope to one finished case study.

Update the portfolio goal on card 11 and milestones on card 12, then revise the map. Check that it fits before the December trip. Return to My Minimum on card 11 after the plan fits.

GOAL	OCTOBER	NOVEMBER	DECEMBER	DONE
★1 Child's room	Walls painted	Furniture assembled; room ready		Safe, usable room
★2 Portfolio	Material selected	No major stage	One case study before trip	One publishable case study
SIDE GOALS	Clear the cellar			-

A DEPENDENCY IS A DIFFERENT CHECK

If furniture delivery moves, assembly and the room-ready target may move too. Record the link on card 16 and update the map where needed. Side goals remain part of the load even without a detailed goal page.