

QUARTERLY PLAN

Give your next conversation a purpose.

Set a direction, choose a sustainable pace, and make room for the follow-through.

Quarter

Year

Conversations per month

What do I want to make possible this quarter?

Consider referrals, speaking opportunities, introductions, or collaborations.

Who could I connect with - and why these people?

Keep this workbook and return to it.

Download and save this PDF, then open it in a PDF reader that supports forms. Save after each editing session. Two conversations a month is a starting suggestion; choose a pace that fits your capacity.

Month 1: make room for connection.

Choose your focus and use the two conversation pages that follow. Print extra copies if needed.

Month / year

My conversation target

What will I focus on this month?

What worked well that should carry into next month?

What did I learn - and what will I adjust?

A clear ask. A useful next step.

Prepare before you meet. Capture the next step afterward, and make it easy for someone to help.

Person / organization

Meeting date

What would make this conversation successful?

What will I ask - and how will I say it?

What are they working on? How can I support them?

What next step did we agree on?

Thanks / materials sent

First reminder sent

Second reminder sent

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Person / organization

Meeting date

What would make this conversation successful?

What will I ask - and how will I say it?

What are they working on? How can I support them?

What next step did we agree on?

Thanks / materials sent

First reminder sent

Second reminder sent

Follow through. Then reflect.

Send thanks and ready-to-forward materials within one business day. Check in after one to two weeks if needed. Two reminders maximum, then let the request go.

Conversation 1: what happened? What is still open?

Conversation 2: what happened? What is still open?

Outstanding commitments / next steps to carry forward

Month 2: make room for connection.

Choose your focus and use the two conversation pages that follow. Print extra copies if needed.

Month / year

My conversation target

What will I focus on this month?

What worked well that should carry into next month?

What did I learn - and what will I adjust?

A clear ask. A useful next step.

Prepare before you meet. Capture the next step afterward, and make it easy for someone to help.

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Meeting date

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Second reminder sent

Follow through. Then reflect.

Send thanks and ready-to-forward materials within one business day. Check in after one to two weeks if needed. Two reminders maximum, then let the request go.

Conversation 1: what happened? What is still open?

Conversation 2: what happened? What is still open?

Outstanding commitments / next steps to carry forward

Month 3: make room for connection.

Choose your focus and use the two conversation pages that follow. Print extra copies if needed.

Month / year

My conversation target

What will I focus on this month?

What worked well that should carry into next month?

What did I learn - and what will I adjust?

A clear ask. A useful next step.

Prepare before you meet. Capture the next step afterward, and make it easy for someone to help.

Person / organization

Meeting date

What would make this conversation successful?

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Conversation 2: what happened? What is still open?

Outstanding commitments / next steps to carry forward

QUARTERLY REFLECTION

Be patient. Check your approach.

Relationships may take months or years to produce business. Review the actions you can control.

Am I inviting the right people for my goals?

Is my ask clear and comfortable? What could I practice?

Is my follow-up useful and reaching them? What will I change?