

***Guidelines to help organize your next Check-In***

**Strategic:**

Report Annually: What are my strategic objectives for this year?

Report Monthly:

* + What progress have I made against my strategic objectives in the last quarter?
  + What new opportunities have arisen and what am I doing about them?
  + What new challenges have arisen and what am I doing about them?

**Tactical:**

Report Annually:

What are my financial objectives?

* + Revenue
  + Net Income / EBITDA
  + Cash
  + Value creation

Report Monthly:

* + Financial update: Performance vs plan and forecast adjustments
  + Sales update: Customer/Market challenges
  + Operational update: People / Tech

**Personal:**

Report Monthly:

* + What is the major event impacting the quality of my life?

**See the Check-In Table:**

**Last Month’s Issue:**

What I said:

What I heard:

What has happened since:

**New Issue(s):**

What I will say:

What I would like to hear:

What I intend to do: