

***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: