

90-day Goal Setting for Thoughtful Business Growth

Design focused sprints for productivity

Schedule a recurring quarterly event on your calendar, **1 to 2 hours**, to set goals using the steps below. Feeling stuck? An example is included on **page two**, and **page three** has AI prompts to help you prepare your list.

1 Start by reflecting on the past 90 days. What were the wins? What did you learn? What didn't get done, and why?

2 Write down the top 3–5 goals you want to hit in the coming 90 days. A few things to consider:

Determine true capacity for what's coming up in your work and personal life (travel, kids, etc.)

Size your goals consistently. Not too big, not too small.

Name them clearly. Start with an action word like draft, determine, or design.

Consider all aspects of the business, including Marketing, Sales, Operations, Finance, and Fulfillment.

Define what 'done' looks like for each one before you move on.

3 Assign an owner and a due date to every goal. A goal without a name attached is a wish.

4 Share the goals with your team so they know where the business is headed.

5 Check that your 90-day goals ladder up to your long-term growth goals. If one doesn't, cut it or park it.

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Here's what this looks like in practice for the Backstage Ops team.

Q2 • Sales + Product Development + Service Focus

90-DAY GOAL	BENCHMARKS	DUE	STATUS
Launch Financial Management + System	• Finalize Finance dashboard metrics, weekly and monthly inputs are complete • Complete 2023 TBDs and reconciliation • Ongoing budget systems and management designed and assigned in Asana • Assign monthly task to set aside quarterly tax payments • Train bookkeeper in Asana DONE	6/24/2024	On Track 5% complete
Develop and roll out a Backstage Ops Podcast	• Record first episode by end of Aug • Create benchmarks and timeline for launch • Create branding strategy for podcast • Create Canva template assets • Create process for guests to be booked and for episodes to be published	6/15/2024	On Track 10% complete
Launch Marketing Focus + System	• Update website with team intro videos • Soft launch email list signup — warm, simple to family + friends • Add consulting team on website • Finalize Marketing dashboard metrics, tasks in Asana for weekly and monthly inputs to be completed	6/14/2024	On Track 10% complete
Establish Liability Insurance (Services + Cyber)	• Determine Provider • Build cost into budget for August • Set up a workflows in Asana for long-term management (review + re-up as needed)	6/15/2024	On Hold 0% complete
Develop Methodology + Training for Ops Kick Start Series	• Workflows built in Asana for consultants to begin delivering these instead of owner • Develop template assets in Canva • Announce protocols and train Team Members	6/15/2024	Stuck 0% complete
Complete a V2 of our Fractional Placement workflows in Asana	• Develop the ideal Client Agreement (commitment level, what's required of them to set us up for success) DONE • Develop the Consultant handoff process • Set clear expectations for first 90 days within the contract, allowing them to use some of the toolkit and ease into the account with a <i>lot</i> of initiatives (1 tool/quarter) • Schedule the contractor check-in calls for each live contract • Refine the current consultant workflow and tracking protocol – asking for help/information DONE • Develop V1 of consultant support + mentorship program to be launched next year	5/31/2024	On Track 45% complete
Develop Backstage Ops Consultants Training Toolkit	• Build out curriculum in a Google document and share with Consultants for initial feedback • Set up learning Management System (Kajabi + Playbook Builder?) for consulting team use	5/31/2024	Completed 100% complete

Don't have bandwidth to achieve your goals? ↓

[Get in Touch](#)

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about bringing on a Fractional COO

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Copy a prompt below and paste it into your preferred AI tool.

Each one will ask you questions first to build your plan.

Built using Sam Richter's GUIDE prompt framework.

PROMPT 1 • Draft your 90-day goals

Use before your planning session

G Goal	Help me build 3-5 focused goals for the next 90 days in my business.
U User	I own a service-based business and will describe my capacity and last quarter.
I Intended Audience	My leadership team will read the final list.
D Delivery	A table with Goal, Benchmarks, Owner, Due Date, and What Done Looks Like. Name every goal with an action verb. Keep them consistently sized.
E Environment	I have limited capacity and competing personal commitments. I'd rather finish four goals than start eight.
Questions	Ask me numbered questions first about last quarter, my available hours, and which areas of the business need attention. Then build the table.

PROMPT 2 • Stress test them

Use once you have a draft list

G Goal	Tell me where my 90-day goals will break.
U User	I wrote these goals, and I want honest pushback, not validation.
I Intended Audience	Me and my leadership team, who will be held to this list.
D Delivery	For each goal, tell me whether "done" is clearly defined, whether it fits my capacity, and whether it depends on something outside my control. Then tell me which one or two you'd cut, and the biggest risk to the quarter.
E Environment	I tend to overcommit. Assume I've listed more than I can finish.
Questions	Ask for my goal list and capacity first. Don't soften it.