

Get real with
your plan.

ANNUAL + 90-DAY PLANNING TEMPLATE

**PATTERN
STRATEGY
GROUP**

Clarity. Focus. Momentum.

Most plans fail because they try to do too much, too far into the future.

This tool is designed to do the opposite.

The Pattern Annual + 90-Day Planning Template helps you clarify what matters most, make a small number of intentional choices, and translate them into action over the next 90 days.

Whether you use this tool for your business or your personal life, it creates focus without over-planning — building in regular review so you can adapt as you go.

Use it to:

- get clear on priorities and trade-offs
- connect long-term direction to near-term action
- build momentum through simple, repeatable planning cycles

This is not about perfect plans.

It's about clarity, focus, and progress.

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ANNUAL CLARITY (LOOK AHEAD)

1. What kind of year do you want this to be? (Describe success in plain language.)

2. Top 3-4 Priorities for the Year (Fewer priorities = more progress.)

- 1. -----
- 2. -----
- 3. -----
- 4. -----

ANNUAL CLARITY (LOOK AHEAD)

3. What will you say no to this year? (Trade-offs you're choosing intentionally.)

4. How do you want to show up? (Behaviours, not outcomes.)

Three guiding words.

1. -----
2. -----
3. -----

90-DAY FOCUS (LOOK CLOSER)

5. What must be true in 90 days? (Meaningful progress – not perfection.)

6. List your top 3 outcomes for the next 90 days.

1. -----
2. -----
3. -----

90-DAY FOCUS (LOOK CLOSER)

7. List key actions (2-4 actions per outcome. Clear owner. Realistic scope.)

Action 1: _____

Action 2: _____

Action 3: _____

Action 4: _____

8. What could get in the way, and how do you address it? (Risks, constraints, competing priorities.)

Risks: _____

Constraints: _____

Competing Priorities: _____

REVIEW & MOMENTUM

9. Review Rhythm (Check one.)

- Weekly (15 min)
- Monthly
- End of 90 days

10. At the next review, ask:

- What moved?

- What stalled?

- What needs to change?

This plan is a tool, not a contract.
Adjust as you learn. Repeat every 90 days.

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ABOUT PATTERN STRATEGY GROUP

Pattern Strategy Group helps organisations find clarity in complexity. We work with public, private, and community-impact organisations to clarify priorities, align teams, and turn strategy into action.

Our approach combines structured strategy, facilitation, and practical tools — helping teams make confident decisions and sustain momentum over time.

If you'd like support applying this tool within your organisation, we'd be happy to start with a conversation.

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