

QUARTERLY GOALS WORKSHEET

A complete planning system for BJJ instructors
who want to grow their academy intentionally.

- Q1 JAN-MAR
- Q2 APR-JUN
- Q3 JUL-SEP
- Q4 OCT-DEC

YEAR: _____ QUARTER: _____ ACADEMY: _____



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1. Introduction

Why quarterly planning transforms academies

Most BJJ instructors are exceptional on the mat. Off the mat, the skills are different. Running an academy requires strategic thinking, goal setting, financial awareness, and systems for growth — things that almost no grappling school ever teaches.

This worksheet solves that gap. It is a complete quarterly planning system built specifically for BJJ instructors and academy owners who want to grow intentionally rather than by accident.

Why quarterly — not yearly?

- Annual goals are too far away to maintain urgency.
- Monthly goals are too short to create meaningful change.
- 90 days is the perfect window: long enough for real results, short enough to stay focused.
- Every quarter, you reset, review, and recommit — with new information.

"Every world champion has a game plan. Every thriving academy has a plan too. The mat doesn't lie — and neither do the numbers."

How to use this worksheet

Work through each section in order. Don't skip the reflection pages — they inform every goal you set going forward. Be honest. Be specific. Vague goals produce vague results.

■ *Recommended time: Set aside 90–120 minutes for your first session. Block it in your calendar before anything else. This time will pay itself back 10x over the quarter.*

Fill in your quarter details before moving on:

Quarter (circle one): Q1 · Q2 · Q3 · Q4

Year:

Academy Name:

Your Name / Role:

Date of Planning Session:

2. Academy Snapshot

An honest picture of where your academy stands right now

Before setting goals, you need an accurate baseline. Complete every field honestly. These numbers are not judgments — they are your starting coordinates.

CURRENT ENROLLMENT

Total active students:

Adults (18+):

Teens (13–17):

Kids (under 12):

New students this month:

Students on trial:

FINANCIAL BASICS

Monthly revenue (avg last 3 months):

Monthly expenses (approx):

Average monthly profit:

Average student monthly fee:

YOUR BIGGEST STRENGTH RIGHT NOW

YOUR MOST PRESSING WEAKNESS OR GAP

3. Last Quarter Review

You can't improve what you don't evaluate

Honest reflection on the past quarter is the most valuable planning exercise you can do. Don't skip this section even if the last quarter was difficult — especially if it was difficult.

1. What were your top 3 wins from last quarter?

Think broadly: student milestones, revenue growth, new programs, personal breakthroughs.

2. What were your top 3 disappointments or missed goals?

Be honest — not to judge, but to learn.

3. What was the single most important lesson from last quarter?

One sentence if possible. Make it specific.

4. What did you try that you won't repeat?

Failed experiments are just data points.

5. What worked so well that you want to do MORE of it?

Double down on what's working.

6. What is the one thing you wish you had started sooner?

4. The Vision Statement

What does a successful quarter look like?

Before setting specific goals, define your vision for the next 90 days. A clear vision makes every goal feel purposeful and every difficult day easier to navigate.

IMAGINE IT'S THE LAST DAY OF THIS QUARTER.

You're sitting in your academy at the end of the quarter. What does it look like? How many students are there? What does the energy feel like?

What specific result are you most proud of achieving this quarter?

How are your students different because of what you built this quarter?

How are YOU different — as an instructor, a business owner, a person?

YOUR QUARTER THEME — Give this quarter a one-sentence theme that captures your intention. Example: 'The Quarter of Retention.' or 'Building a Kids Program That Scales.'

My Quarter Theme:

5. Student Enrollment Goals

Growth starts with knowing your exact target

Enrollment goals must be specific and measurable. 'Get more students' is not a goal. 'Add 8 new adults by the end of March' is.

■ **Current total students:**

■ **Target total students by end of quarter:**

■ **Net new students needed (target minus current):**

ENROLLMENT BREAKDOWN BY PROGRAM

Adults BJJ — Target:

Kids BJJ — Target:

Teens — Target:

Women-Only (if applicable) — Target:

No-Gi / Open Mat — Target:

Where will these new students come from? (List 3 specific sources)

Examples: referrals, social media, local events, paid ads, school partnerships.

What is the one thing that most prevents new students from enrolling at your academy?

Be honest — price, location, intimidation, lack of awareness?

What specific action will you take this quarter to remove that barrier?

6. Revenue & Financial Goals

The academy that knows its numbers grows with intention

Financial clarity is not greed — it is sustainability. An academy that cannot sustain itself financially cannot serve its students long-term. Own your numbers.

Monthly revenue target:

Quarterly revenue target (x3):

Current monthly average revenue:

Revenue gap to close this quarter:

REVENUE SOURCES THIS QUARTER

Monthly memberships:

Trial/intro programs:

Private lessons:

Merchandise / Gi sales:

Seminars or special events:

Other:

What is the single highest-leverage action you can take to increase revenue this quarter?

What is one expense you will reduce or eliminate this quarter?

If you could only add ONE new revenue stream this quarter, what would it be?

Private lessons, merchandise, online content, kids program, competitions...

7. Curriculum & Teaching Quality Goals

Better teaching = better retention

The quality of your teaching is your most important competitive advantage. Students stay because of results and experience. Both depend on your curriculum.

What is the main technical focus for your curriculum this quarter?

Example: Guard game, takedowns, submissions from the back, self-defense.

What structured curriculum system will you use this quarter?

IBJJF, Gracie University, your own system, Mata Leao, etc.

What is one class format change you will test this quarter?

Examples: drilling-first format, theme weeks, positional sparring only days.

How will you measure if your teaching quality improved this quarter?

Student feedback, technique retention, belt promotions, competition performance.

List 3 specific techniques or concepts you will teach more effectively this quarter:

8. Student Retention Goals

Keeping students is more valuable than finding them

Acquiring a new student costs 5–7x more than keeping an existing one. Your retention rate is the most important number in your academy.

Current monthly retention rate (%): _____

Target retention rate by end of quarter (%): _____

Average student tenure (months): _____

Students at risk of quitting (estimate): _____

What is the #1 reason students leave your academy?

If you don't know — ask your most recent 3 students who quit.

What specific retention system will you implement this quarter?

Welcome sequence, monthly check-ins, progress tracking, milestone celebrations...

Name 3 students who are at risk of quitting. What will you do for each one?

How will you make your academy harder to leave this quarter?

Community, results, relationships, recognition — which lever will you pull?

9. Community & Culture Goals

Culture is what keeps students for a decade

The most successful academies in the world are not just gyms — they are communities. Culture is built intentionally, one decision at a time. This quarter, you will build it on purpose.

How would you describe the current culture of your academy in 3 words?

How do you WANT your culture to be described in 3 words?

What's the gap? That gap is your work this quarter.

What community event will you organize this quarter?

Open mat, BBQ, competition watch party, charity class, team outing...

How will you formally celebrate student progress and milestones this quarter?

Promotions, achievements, personal victories — make them visible and public.

What is one new community tradition you will start this quarter?

Post-class ritual, whiteboard wins, photo wall, student of the month...

How will you help new students feel like they belong within their first 30 days?

10. Marketing & Growth Goals

Visibility is the first step to enrollment

You can have the best academy in the city and lose to the one that markets better. This quarter, your marketing must be as intentional as your curriculum.

SOCIAL MEDIA & CONTENT GOALS

Primary platform this quarter:

Weekly posting frequency:

Content theme / pillars:

What is your referral strategy this quarter?

Formal referral program, incentives, word-of-mouth cultivation...

What one marketing channel will you commit to mastering this quarter?

Instagram Reels, Google Business, Facebook Groups, local partnerships, email...

What is your free trial / intro offer this quarter?

Duration, price, follow-up process — be specific.

How many leads do you need to reach your enrollment goal?

If your close rate is 50% and you need 10 students = 20 leads needed.

11. Personal Development Goals

You can only teach what you are still becoming

The best instructors never stop growing. Your personal development as a teacher, a leader, and a practitioner directly determines the ceiling of your academy.

YOUR TRAINING

Training frequency goal (sessions/week):

Specific technique area to improve:

Training partner or sparring goal:

YOUR LEADERSHIP & BUSINESS DEVELOPMENT

What book, course, or resource will you complete this quarter?

Leadership, business, teaching, sports psychology — choose one and finish it.

What is one leadership skill you want to develop this quarter?

Communication, delegation, conflict resolution, motivation, public speaking...

Who is your mentor or accountability partner for this quarter?

If you don't have one — this is the quarter to find one.

What self-care or recovery routine will you commit to this quarter?

Sleep, nutrition, mental health — you teach more through your presence than your words.

What does success look like for YOU personally by end of this quarter?

Beyond the academy — family, health, finances, fulfillment.

12. Monthly Milestones Breakdown

Break the quarter into 3 achievable sprints

A quarter of 90 days broken into 3 months is easier to execute. Each month has a primary focus and measurable milestone. Set them now — adjust at the 30 and 60 day marks.

MONTH 1 — LAUNCH

The first month is about momentum. Start strong, build the systems.

Primary focus for month 1:

Key enrollment milestone:

Key revenue milestone:

Key retention action:

Must-complete task this month:

MONTH 2 — BUILD

The second month is about execution. Double down on what's working.

Primary focus for month 2:

Key enrollment milestone:

Key revenue milestone:

Key retention action:

Must-complete task this month:

MONTH 3 — FINISH

The final month is about closing. Push to the goals, prepare for Q+1.

Primary focus for month 3:

Key enrollment milestone:

Key revenue milestone:

Key retention action:

Must-complete task this month:

13. Weekly Action Planner

90 days is 13 weeks. Plan them like a championship camp.

Choose your top 3 weekly actions at the start of every week. These should directly contribute to your quarterly goals. Nothing else competes.

WEEK 1 Dates: _____ to _____

Action 1:

Action 2:

Action 3:

WEEK 2 Dates: _____ to _____

Action 1:

Action 2:

Action 3:

WEEK 3 Dates: _____ to _____

Action 1:

Action 2:

Action 3:

WEEK 4 Dates: _____ to _____

Action 1:

Action 2:

Action 3:

WEEK 5 Dates: _____ to _____

Action 1:

Action 2:

Action 3:

WEEK 6 Dates: _____ to _____

Action 1:

Action 2:

Action 3:

WEEK 7 Dates: _____ to _____

Action 1:

Action 2:

Action 3:

WEEK 8 Dates: _____ to _____

Action 1:

Action 2:

Action 3:

WEEK 9 Dates: _____ to _____

Action 1:

Action 2:

Action 3:

WEEK 10 Dates: _____ to _____

Action 1:

Action 2:

Action 3:

WEEK 11 Dates: _____ to _____

Action 1:

Action 2:

Action 3:

WEEK 12 Dates: _____ to _____

Action 1:

Action 2:

Action 3:

WEEK 13 Dates: _____ to _____

Action 1:

Action 2:

Action 3:

14. Obstacles & Solutions

Pre-solve your problems before they stop you

The best plans anticipate resistance. Identify every potential obstacle NOW — before it derails your momentum. For each obstacle, write the solution you'll use.

Complete this table for each potential obstacle. Be specific.

Obstacle 1: Low student attendance or engagement

My solution:

Obstacle 2: Financial shortfall mid-quarter

My solution:

Obstacle 3: Key instructor gets injured or leaves

My solution:

Obstacle 4: Personal burnout or loss of motivation

My solution:

Obstacle 5: Aggressive competition from another academy

My solution:

Obstacle 6: Student dropout spike

My solution:

Obstacle 7: Marketing efforts not generating leads

My solution:

Obstacle 8: Conflict within the team or with a student

My solution:

15. Accountability System

Goals without accountability are just wishes

Research consistently shows that people who write their goals and share them with a committed accountability partner achieve significantly more than those who don't. Build your system now.

YOUR ACCOUNTABILITY PARTNER

Name: _____

Role/Relationship: _____

Contact: _____

Check-in frequency: _____

Check-in format (call/text/in-person): _____

YOUR TRACKING SYSTEM

How will you track student enrollment weekly? _____

How will you track revenue progress monthly? _____

How will you track student retention rate? _____

Where will you store and review this worksheet? _____

What day of the week is your weekly planning session? _____

MY COMMITMENT

Write a one-sentence commitment to yourself for this quarter. Sign and date it. Photograph it. Keep it visible.

Signature: _____ Date: _____

16. End-of-Quarter Review

Close the loop — this page feeds your next quarter

Complete this page on the last week of the quarter. It becomes the foundation of your next quarterly planning session. Be ruthlessly honest.

RESULTS vs. GOALS

Enrollment goal:

Actual result:

Revenue goal:

Actual result:

Retention goal:

Actual result:

Personal development goal:

Actual result:

What are you most proud of this quarter?

What will you do differently next quarter?

What goal carries over to next quarter?

Rate your overall performance this quarter (1–10) and explain:

What is the single most important lesson from this quarter?

"The champion who reviews well plans better. The instructor who reflects grows faster. OSS."
