

## 150 | Quarterly Planning with Manali Sontakke

**Christi Johnson:** Hello, friends. Welcome back to *The Dream Biz Podcast*, the business podcast that helps you automate, streamline, and grow your business so you can work less, make more money, and flourish beyond what you thought possible. I'm your host, Christi Johnson. I'm a small business consultant dedicated to helping you make your dream biz a reality. Every week on the podcast, I share actionable tips to help you grow and launch your business. And I love bringing in guests to help expand the knowledge.

I'm super excited to have today **Manali Sontakke**. She's the owner of *Manali Photography*. She is a photographer, private photo editor, and also does some OBM and integration work. So we have that in common. **Manali, thank you so much for being here on the podcast.**

**Manali Sontakke:** Thanks so much for having me, Christi. I'm super excited.

**Christi Johnson:** I am so excited too. So you and I met at the Creative Educator Conference back in January of 2024. It was such a great conference, and I love that we were able to connect. We found out that we kind of had a similar journey. **You, correct me if I'm wrong, but you do photography or did photography, right?**

**Manali Sontakke:** Yeah, so I started my business back in 2018 as a wedding and proposal photographer. I did weddings for, I think, nine years total—five while running my business. Then I transitioned into brand photography and eventually into editing for other wedding photographers. I actually photographed my last wedding in April of this year.

**Christi Johnson:** Okay. Yeah. So I have a similar journey. I did wedding photography and portrait photography. Then in 2019, I started doing photo editing, and from there, I transitioned into doing more backend work for business owners, like online business management and things like that. **It sounds like that's what you're doing now too. Why don't you tell us a little bit more about how you serve your clients?**

**Manali Sontakke:** Yeah. That has been the newest thing I've started offering for clients. Digital product integration was something I began doing for friends back in 2020 as I was figuring out if I wanted to stay with wedding photography long-term or switch things up. You and I have both talked about being very multi-passionate, and that comes out in our businesses.

It started back then, and more people have asked about it, especially after the Creative Educator Conference this year. Now, it's my main service—helping photographers offering digital products and education in their businesses with the setup, tech, and backend work.

I still edit for wedding photographers and work with many in the creative online space. I absolutely love it.

**Christi Johnson:** Awesome. Now, one of the things I love about you is you're not just an incredible service provider for business owners—you're also an incredible business owner

yourself. **I really wanted to talk about quarterly planning with you because I know that's something you're passionate about. What are some of your approaches to quarterly planning, and why is it important to you?**

**Manali Sontakke:** Quarterly planning is a concept I learned after my first year in business. As a new business owner, I was so excited and passionate, with so many projects I wanted to tackle. My initial take on planning was using a Word document to list tasks month by month.

But by August, I realized things were being bumped from month to month because of client shoots and balancing a full-time job. That's when I discovered quarterly planning, which helped me better manage my expectations and balance client work with business projects.

Planning in 90-day chunks allows me to focus, be realistic, and achieve my goals without overwhelm. There's even research suggesting our brains work well with shorter timeframes like 90 days. It's been a game-changer for me over the past five years.

**Christi Johnson:** Awesome. I love how you were saying that you're an Enneagram 3. I am the same way, and I'm a chronic overachiever. **Focusing my goals in quarterly chunks has been a game-changer for me too. I'd love to talk about how to set actionable and realistic goals with a quarterly plan. What does it look like for you in practice when mapping out your quarterly plan?**

**Manali Sontakke:** This might sound strange, but for me, setting goals is the last component of quarterly planning. I start by looking at how much time I have on my calendar and what's happening in my business before setting goals.

I reflect on the past 90 days by reviewing my calendar, project management system, and personal routines. I ask myself how I've been feeling and how my energy and mindset have been. Then I pull out the calendar for the upcoming 90 days and block off vacations, personal days, or anything else.

I also review my finances to ensure I know my projected income and expenses. If there's a gap, my focus shifts to booking more work. I then decide what services or offers to prioritize for marketing. After doing this foundational work, I set my goals—usually zero to three.

I call them projects rather than goals and ensure they're achievable within the quarter. If life or client work is overwhelming, it's okay to focus on maintaining rather than growing.

**Christi Johnson:** Awesome! I love the plan you've laid out—reflecting on the previous 90 days, reviewing your calendar, checking finances, focusing on services, and then setting goals. **Can we talk more about the check-in phase when looking back on the past 90 days? How do you determine if you achieved what you set out to do? Do you use metrics or take a more general approach?**

**Manali Sontakke:** I do check-ins by reviewing my calendar, project management system (I use Asana), and PowerSheets. PowerSheets have monthly, weekly, and daily goal sections, and I split mine into business and personal categories.

I visually check if I completed my goals, whether they're business or personal. For example, I look at my Asana tasks to see if they were completed or if anything needs to carry over to the next quarter.

**Christi Johnson: How often do you check your progress during the quarter to stay consistent and on track?**

**Manali Sontakke:** I have one day each month for a quick planning session where I review insights, analytics, and progress. It takes about an hour because the heavy lifting happens during quarterly planning.

I also have weekly check-ins on Fridays to assess the week and prepare for the next. My PowerSheets and a calendar version of my quarterly plan are always in front of me, so I glance at them daily, even if I don't check everything in detail.

**Christi Johnson: When do you do your quarterly planning? How far in advance of the new quarter do you plan?**

**Manali Sontakke:** I usually plan in the week before the new quarter starts. For example, I block two days, typically Wednesday and Thursday or Thursday and Friday, right before the quarter begins. It's like a mini business retreat.

**Christi Johnson: How do you determine how long a goal will take? Sometimes I struggle with breaking down larger goals and gauging if they're achievable within a quarter. Do you have any tips for this?**

**Manali Sontakke:** For new projects, I assume tasks will take twice as long as I expect. If it's something I've done before and have a system for, I challenge myself to complete it in about three-fourths the usual time.

I break goals into three to seven high-level steps and block time for each step on my calendar. This mapping helps me see how realistic a timeline is. For example, if a project looks like it will take six weeks, I know it's not something I can rush in three weeks.

**Christi Johnson: What tools do you use to plan in your business? You've mentioned Asana, PowerSheets, and a whiteboard—can you give us a deeper look at your planning system?**

**Manali Sontakke:** I use a mix of digital and physical tools. I like Kat Schmoyer's quarterly and yearly calendars, which I got printed on foam board for dry-erase use. It's visual and sits on my desk.

Asana is my go-to for delegating tasks and breaking down goals into manageable steps. My Asana integrates with Google Calendar, so I block off quarterly planning days at the start of the year and ensure no client work overlaps.

**Christi Johnson: How do you balance your personal life and business, especially as a multi-passionate entrepreneur? Do you have systems for avoiding shiny object syndrome and staying focused on your services?**

**Manali Sontakke:** I use a template calendar to allocate time for client work, marketing, and team check-ins. It shows how much time I have for projects versus clients.

I also set hard stop times for work to prioritize personal life. During busy seasons, I counterbalance by taking extra time off later. Boundaries help prevent burnout and ensure balance.

**Christi Johnson:** Awesome. Boundaries are super important. **Is there anything else we missed about quarterly planning? Any final tips, and where can people find you online?**

**Manali Sontakke:** I have a Google Doc template that walks through the process in detail. It's customizable, so you can make it your own. I'll share the link for anyone interested.

You can find me on Instagram at [@ManaliSontakke](#) and my website, [ManaliPhotography.com](#).

**Christi Johnson:** Awesome. We'll include that guide, your Instagram, and your website in the show notes and description. Thank you so much for sharing your insights—I can't wait to plan my next quarter using your guide!

**Manali Sontakke:** Thanks so much for having me. It was super fun.

**Christi Johnson:** Be sure to check out Manali's links in the show notes and join me back next week for another episode of *The Dream Biz Podcast*. Bye for now!