

WELCOME

MARCH LIFESTYLE COACHING CALL



UPCOMING EVENTS

- April 18: 10:00 a.m. PT: Tribe Talk: Telling Your Story
- April 18, 10:50 a.m. PT: Tribe Talk: One Page Plan in the Amazing First Meeting
- April 25: Coaching Call: The Referral Roadmap



NEWS YOU CAN USE

Top 3 Tribe Posts

- Overcoming Bottleneck in Client Onboarding (Leah Coleman)
- One-Page Financial Plan Success (Ed Wildermuth)
- Post Retreat Big Energy (Danny Michael)

Join our new Limitless Book Club on Tribe!

FOR TODAY'S QUESTIONS

[slido.com](https://www.slido.com), [#GoodVibes](https://twitter.com/GoodVibes)

on your phone or second screen



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THE
QUARTERLY
BUSINESS
REVIEW

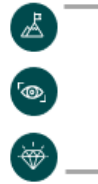
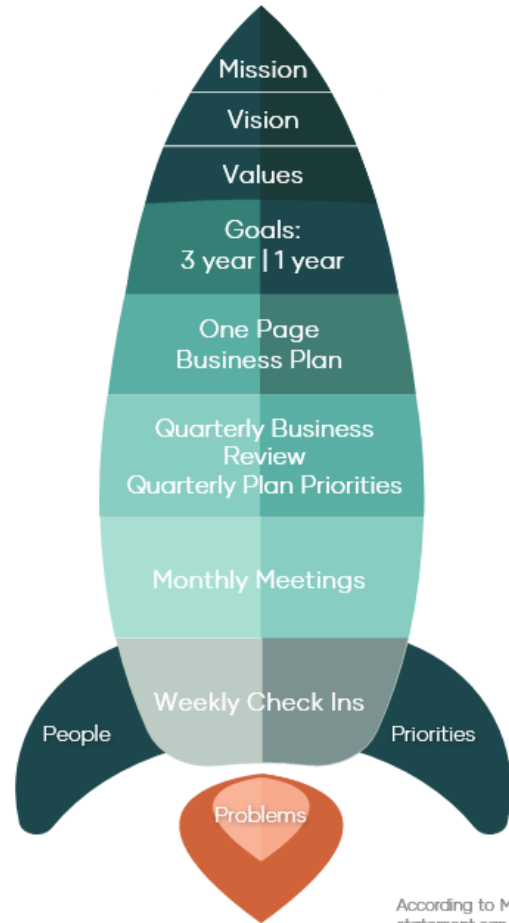
A PROVEN SYSTEM

for managing progress and performance

THE LIMITLESS LAUNCH PROCESS

A simple business planning process to take agency over your practice and achieve new levels of success

YOU CAN'T
MANAGE
WHAT YOU
CAN'T
MEASURE



CLARITY
your what and why



TRANSPARENCY
view on plans and progress



ACCOUNTABILITY
ownership of results

According to Medley (1992) and Wilson (1992), the existence of a detailed mission statement can lead to a 50% increase in the effectiveness of the company.



PROACTIVE
PROCESS-DRIVEN
PRIORITY FOCUSED
PROFESSIONALLY MANAGED

 ALSO WATCH:
ACTION & ACCOUNTABILITY LESSON

Mapping your BUSINESS VISION



OUR VISION FOR SUCCESS		DESCRIBE WHAT THIS WILL LOOK LIKE:
MISSION		
VISION		
VALUES		

	CURRENT (20__)	1-YEAR GOALS (20__)	3-YEAR GOALS (20__)	WHAT WILL IT TAKE?
REVENUE				
AUM				
AVE REV / CLIENT				
# DAYS OFF				
HOURS / WEEK				
# IDEAL CLIENTS				
OTHER _____				



THE VISION
AND THE GAPS
CREATE THE ROADMAP

2022 1-Page *Business Plan*

3-YEAR GOALS

1-YEAR GOALS

KEY OBJECTIVES

QUARTERLY PRIORITIES

\$1M REVENUE + 100 DAYS OFF

TAKE 60 DAYS OFF

SYSTEMATIZE CLIENT SERVICES

GROW REVENUE 20% to \$600,000

Maximize time

Focus on \$1000/hr RPA

Increase Rev/Client to \$6,500

Build Client Service model

Draft core processes

Automate workflows

Increase Rev per Client to \$6,500

6 new clients from digital marketing

10 referrals (5 COI/Client)

Q1	<ul style="list-style-type: none"> Implement Annual Calendar and Time Blocking 	<ul style="list-style-type: none"> Hire Virtual Asst 		<ul style="list-style-type: none"> Hire Redtail consultant 		<ul style="list-style-type: none"> Choose niche 	<ul style="list-style-type: none"> Plan & Prep for Q2 podcast launch 	<ul style="list-style-type: none"> Prep COI campaign
Q2	<ul style="list-style-type: none"> Implement Calendly 			<ul style="list-style-type: none"> First Client Meeting Surge 		<ul style="list-style-type: none"> Build brand/story 	<ul style="list-style-type: none"> Develop downloads (outsource) 	<ul style="list-style-type: none"> Launch Referral Roadmap
Q3			<ul style="list-style-type: none"> Define Client Service Model 			<ul style="list-style-type: none"> Update website Online sales funnel 	<ul style="list-style-type: none"> SEO Optimization 12 new online leads 	<ul style="list-style-type: none"> Launch COI campaign (niche intro)
Q4		<ul style="list-style-type: none"> Raise fees / client transitions Hire P/T paraplanner 	<ul style="list-style-type: none"> Raise fees / client transitions 	<ul style="list-style-type: none"> Raise fees / client transitions 	<ul style="list-style-type: none"> Prospect process 		<ul style="list-style-type: none"> 12 new online leads 	<ul style="list-style-type: none"> Thanksgiving Referral Campaign (Clients and COI)

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QUARTERLY BUSINESS REVIEW WORKBOOK



ARE WE ON TRACK?

WHY, OR WHY NOT?

WHAT NEEDS ATTENTION?

WHAT ACTION WILL WE TAKE?



FINANCIAL
PERFORMANCE



PRACTICE
PERFORMANCE



MARKETING
PERFORMANCE



PERSONAL/PROF.
PERFORMANCE

HABIT MEANING:

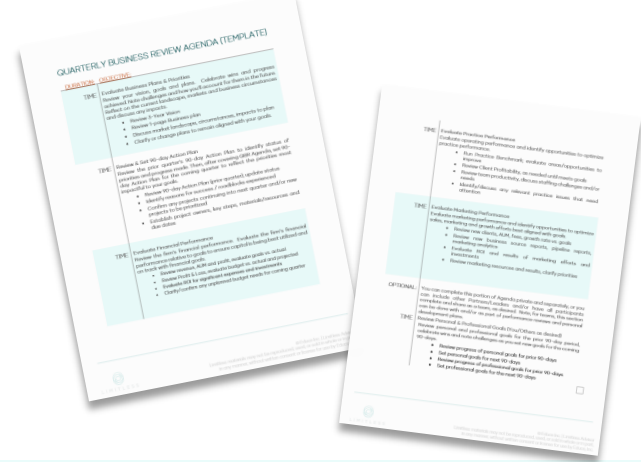
1. something that you do often and regularly, sometimes without knowing that you are doing it

progress

[prə'gres] noun

the movement towards a goal or to a further or higher stage.

if there is no struggle, there is no progress.



QUARTERLY BUSINESS REVIEW AGENDA



Review 3-Year Vision, 1-pg Business Plan & Landscape

Review & Set 90-day Action Plan

Evaluate Financial Performance

Evaluate Practice Performance

Evaluate Marketing Performance

Review Personal & Professional Goals (Founder/Others as desired)

Review your vision, goals and plans. Celebrate wins and progress achieved. Note challenges and how you'll account for them in the future. Reflect on the current landscape, markets and business circumstances and discuss any impacts.

- o Review 3-Year Vision
- o Review 1-page Business plan
- o Discuss market landscape, circumstances, impacts to plan
- o Clarify or change plans to remain aligned with your goals.

Review the prior quarter's 90-day Action Plan to identify status of priorities and progress made. Then, after covering QBR Agenda, set 90-day Action Plan for the coming quarter to reflect the priorities most impactful to your goals.

- o Review 90-day Action Plan (prior quarter); update status
- o Identify reasons for success / roadblocks experienced
- o Confirm any projects continuing into next quarter and/or new projects to be prioritized
- o Establish project owners, key steps, materials/resources and due dates

Evaluate the firm's financial performance relative to goals to ensure capital is being best utilized and financial performance is on track with goals.

- o Review revenue, AUM and profit, evaluate goals vs. actual
- o Review Profit & Loss, evaluate budget vs. actual and projected
- o Evaluate ROI for significant expenses and investments
- o Clarify/confirm any unplanned budget needs for coming quarter

Evaluate operating performance and identify opportunities to optimize practice performance.

- o Run Practice Benchmark; evaluate performance and opportunities to improve
- o Review Client Profitability, as needed until meets goals
- o Review team productivity, discuss staffing challenges and/or needs
- o Identify/discuss any relevant practice issues that need attention

Evaluate marketing performance and identify opportunities to optimize sales, marketing and growth efforts best aligned with goals.

- o Review new clients, AUM, fees, growth rate vs. goals
- o Review new business source reports, pipeline reports, marketing analytics
- o Evaluate ROI and results of marketing efforts and investments
- o Review marketing resources and results, clarify priorities

Review personal and professional goals for the prior 90-day period, celebrate wins and note challenges as you set new goals for the coming 90-days.

- o Review progress of personal goals for prior 90-days
- o Set personal goals for next 90-days
- o Review progress of professional goals for prior 90-day
- o Set professional goals for next 90 days
- o Set professional goals for the next 90-days

PREPPING FOR QBR

You'll run and reference the following reports quarterly:

- o P&L, Budget vs. Actual
- o AUM report (new, client contributions, market)
- o New Business / Pipeline Report
- o Practice Benchmark
- o Client Profitability (annually, review quarterly as needed)
- o Others: customize as desired

Client Profitability Analysis

This client-based analysis is designed to provide you with a high-level overview of the profitability, capacity and growth of your client base. Follow the steps below to update the example data in order to complete your analysis.

STEP 1: IDENTIFY YOUR CLIENT SEGMENTS AND TIERS
Client segments are groups of clients that receive similar products and services. There are sub-sets of a segment which are typically defined by the revenue they generate. If you have multiple client segments that have unique tiers, you should complete a separate profitability analysis for each segment. If your client base follows a more of a standard segmentation approach (i.e. A, B, C), simply set your segments as each tier.

STEP 2: DEFINE REVENUE, NUMBER AND NEW CLIENTS BY TIER
For each tier, estimate the average revenue per client, the current number of clients, and the number of new clients anticipated per year.

STEP 3: INPUT FIRM EXPENSES AND SELECT WEIGHTING METHOD
Input the firm expenses allocated to this client segment. If your analysis includes all clients, this would be your total expenses for the firm. Then select how you want to allocate expenses to each client tier. The most commonly selected weighting methods are Advisor Hours and Firm Hours.

STEP 4: INPUT ADVISOR CAPACITY
Input the number of hours each advisor has available for clients. The standard year has 2,080 hours. We recommend removing hours for holidays, vacations and non-client related activities. If you do not input data, the tool will populate with 1,800 hours available capacity.

Analysis Inputs

Tier Name	Average Revenue	Current Clients	New # Clients	Advisor Hours	Start Date	Expenses & Weighting Methods
Tier 1 Name	\$1,000	10	2	10	10	\$120,000
Tier 2 Name	\$2,000	15	3	15	15	
Tier 3 Name	\$3,000	20	4	20	20	
Tier 4 Name	\$500	30	5	30	30	

Profile Calculator	Revenue	Overhead	Profit	Profit %
1	40,000	24,700	15,300	38.25%
2	65,000	40,917	24,083	37.05%
3	54,000	32,353	21,647	40.09%
Firm Totals	204,000	128,000	76,000	37.26%

Year	1	2	3	4	5
Revenue	40,000	65,000	54,000	204,000	204,000
Overhead	24,700	40,917	32,353	128,000	128,000
Profit	15,300	24,083	21,647	76,000	76,000
Profit %	38.25%	37.05%	40.09%	37.26%	37.26%

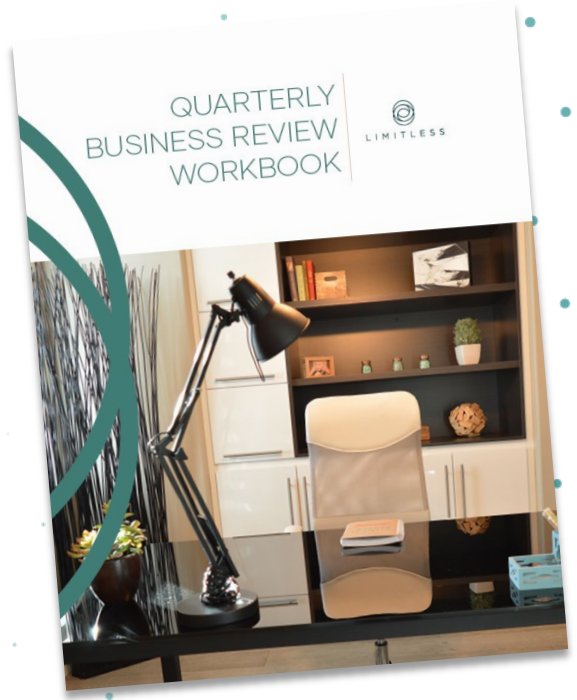
THE PRACTICE BENCHMARK ANALYSIS: INPUTS & HISTORICALS

Instructions:
 1. In the cells to the right, select the current year and the quarter end date. Note: results will not be accurate if the information does not match inputs below. You must update the quarterly dropdowns in order for months prior to the current quarter to function properly.
 2. Gather data from the Firm Data Inputs column for the prior 3 years and for each quarter of the current year. Note: Current year data is input for each quarter. If you do not input a value for current (dropdown) quarters in an annualizing tool, the annual estimate will revert to the previous quarter's annualization estimate.
 3. Input practice/quarterly data into the light blue cells, with greyed ONLY. Dark blue/white and white cells will auto-calculate. Do not input over these formulas.
 4. Review year-over-year changes to evaluate historical trends.

	2019	2020	YOY %	2021	YOY %	Q1	Q2	Q3	Q4	2022 Est. Total	YOY %
Firm Data Inputs											
Headcount	1	2	100%	3	50%	1	1	1	1	1,000,000	41%
Advisor Professionals	1	0	0%	1	100%	1	1	1	1	1,000,000	60%
New-Advisor Professionals	1	1	10%	0	-100%	0	0	0	0	1,000,000	-80%
Deal Members	1	1	100%	2	100%	1	1	1	1	1,000,000	40%
Revenue											
Total (Gross) Revenue	\$120,000	\$445,000	271%	\$110,000	91%	\$28,750	\$28,750	\$28,750	\$28,750	\$110,000	91%
Investment Management (AUM)	\$0	\$0	0%	\$0	0%	\$0	\$0	\$0	\$0	\$0	0%
Fee	\$0	\$0	0%	\$0	0%	\$0	\$0	\$0	\$0	\$0	0%
Investment Advisory (IA) Fee	\$0	\$0	0%	\$0	0%	\$0	\$0	\$0	\$0	\$0	0%
Overhead/Trade & Commission	\$20,000	\$75,000	275%	\$60,000	90%	\$15,000	\$15,000	\$15,000	\$15,000	\$60,000	90%
Insurance/Trade & Commission	\$20,000	\$75,000	275%	\$60,000	90%	\$15,000	\$15,000	\$15,000	\$15,000	\$60,000	90%
Financial Planning Fee (based on AUM)	\$0	\$0	0%	\$0	0%	\$0	\$0	\$0	\$0	\$0	0%
Other	\$0	\$0	0%	\$0	0%	\$0	\$0	\$0	\$0	\$0	0%
Expenses											
Total Expenses	\$20,000	\$145,000	225%	\$110,000	45%	\$28,750	\$28,750	\$28,750	\$28,750	\$110,000	45%
Overhead (Professional)	\$10,000	\$35,000	250%	\$30,000	60%	\$7,500	\$7,500	\$7,500	\$7,500	\$30,000	60%
Advisor Compensation	\$10,000	\$110,000	1000%	\$80,000	70%	\$21,250	\$21,250	\$21,250	\$21,250	\$80,000	70%
Indirect Expense	\$0	\$0	0%	\$0	0%	\$0	\$0	\$0	\$0	\$0	0%
Staffing	\$0	\$0	0%	\$0	0%	\$0	\$0	\$0	\$0	\$0	0%
Overhead (Cost of Goods Sold, etc.)	\$0	\$0	0%	\$0	0%	\$0	\$0	\$0	\$0	\$0	0%
COGS (Cost of Goods Sold, etc.)	\$0	\$0	0%	\$0	0%	\$0	\$0	\$0	\$0	\$0	0%
Churns	\$0	\$0	0%	\$0	0%	\$0	\$0	\$0	\$0	\$0	0%
Total Client	\$100,000	\$300,000	200%	\$0	0%	\$0	\$0	\$0	\$0	\$0	0%
# of the brand client	1	1	100%	1	100%	1	1	1	1	1	100%
Assets	\$1,000,000	\$2,000,000	200%	\$1,000,000	100%	\$250,000	\$250,000	\$250,000	\$250,000	\$1,000,000	100%
Assets under Management	\$1,000,000	\$2,000,000	200%	\$1,000,000	100%	\$250,000	\$250,000	\$250,000	\$250,000	\$1,000,000	100%
Lifestyle	\$0	\$0	0%	\$0	0%	\$0	\$0	\$0	\$0	\$0	0%
Partners/Advisor Days Off	0	0	0%	0	0%	0	0	0	0	0	0%



THE QBR workbook



2022 BUSINESS GOALS

Conduct annual strategic planning and update this page with goals and priorities for the year.

NAME: _____
YEAR: _____

	ANNUAL GOALS	Q1	Q2	Q3	Q4
GET CLEAR	Revenue				
	ALM				
	EMOC				
	Average Fee				
	Avg Revenue/Client				
	# Clients				
	# Ideal Clients				
	# Days Off				
	Avg Profit per %				
	Insert KPI#2 here				
Insert KPI#3 here					
GET FOCUSED	TOP 3 PRACTICE GOALS THIS YEAR:	WHY IT MATTERS / WHAT WILL IMPROVE?			
	TOP 3 PROFESSIONAL GOALS FOR THIS YEAR:	WHY IT MATTERS / WHAT WILL IMPROVE?			
	TOP 3 PERSONAL GOALS FOR THIS YEAR:	WHY IT MATTERS / WHAT WILL IMPROVE?			
GET TO WORK	TOP 3 GOALS/OUTCOMES FOR THIS YEAR	REASON / IMPACT			
	#1 DESIRED OUTCOME/GOALS	REASON / IMPACT			
	#2 DESIRED OUTCOME/GOALS	REASON / IMPACT			
	#3 DESIRED OUTCOME/GOALS	REASON / IMPACT			

Q1 PRACTICE GOALS

Intends, Resources, Budget Needs?

PRIORITY 1	PRIORITY 2	PRIORITY 3
Key steps / Milestones	Key steps / Milestones	Key steps / Milestones

Why is this important?
What does success look like?
What challenge might be faced?
How can we prepare for / overcome them?

Q1 PROFESSIONAL GOALS

Intends, Resources, Budget Needs?

PRIORITY 1	PRIORITY 2	PRIORITY 3
Key steps / Milestones	Key steps / Milestones	Key steps / Milestones

Why is this important?
What does success look like?
What challenge might be faced?
How can we prepare for / overcome them?

Q1 PERSONAL GOALS

Intends, Resources, Budget Needs?

PRIORITY 1	PRIORITY 2	PRIORITY 3
Key steps / Milestones	Key steps / Milestones	Key steps / Milestones

Why is this important?
What does success look like?
What challenge might be faced?
How can we prepare for / overcome them?

Q1 90-DAY PLAN: Practice Goals

BOOK DATES	PRIORITY	KEY ACTIONS	Q1 DATE	OWNER	STATUS

Q1 90-DAY PLAN: Professional Goals

BOOK DATES	PRIORITY	KEY ACTIONS	Q1 DATE	OWNER	STATUS

Q1 90-DAY PLAN: Personal Goals

BOOK DATES	PRIORITY	KEY ACTIONS	Q1 DATE	OWNER	STATUS

QUARTERLY SNAPSHOT

This section tracks your Quarterly Business Review Agenda to capture key take-aways and action items.

VISION & GOALS REVIEW

Review vision and goals to maintain clarity of purpose and outcomes desired.

TASK	UPDATE & NOTES
Review 3-Year Vision	
Discuss market landscape, key trends, impacts to plans	
Discuss Top 3 Wins and Top 3 Challenges	
Review 1-pg Business Plan	

FINANCIAL REVIEW

Review financial performance relative to goals.

GOALS	Y/N	REASONS / LEARNING / IMPACT
Did we meet or exceed quarterly financial goals?		
Did we meet or exceed quarterly ALM goals?		
Did we meet or exceed quarterly EBOC goals?		

PRACTICE REVIEW

Identify top 3 practice wins and challenges this quarter.

3 BIGGEST WINS		3 BIGGEST CHALLENGES FACED	
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.

PRACTICE GOALS

GOALS	Y/N	REASONS / LEARNING / IMPACT
Did we achieve Priority 1 for the quarter?		
Did we achieve Priority 2 for the quarter?		
Did we achieve Priority 3 for the quarter?		

PERFORMANCE REVIEW

Run Practice Benchmark and evaluate performance relative to your goals.

GOALS	Y/N	REASONS / LEARNING / IMPACT
Is firm productivity where it needs to be?		
Is client revenue/profitability in line with performance goals?		
Is advisor / team productivity where it needs to be?		

PERFORMANCE REVIEW CONTINUED:

TOP 3 WINS WE ARE MEASURING AND MANAGING TO IMPROVE +/-	REASONS / LEARNING / IMPACT

MARKETING REVIEW

Review key marketing data to evaluate marketing progress for the quarter.

GOALS	Y/N	REASONS / LEARNING / IMPACT
Did we complete our marketing plan for the quarter?		
Did we meet our growth goals for the quarter?		

KEY MARKETING WINS		KEY MARKETING CHALLENGES	
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.

Identify top 3 practice opportunities or challenges that need attention.

PRIORITY	IMPACT	PRIORITY LEVEL	NEXT ACTION

PERSONAL GOALS

Use this section to evaluate progress toward personal goal (complete one copy for each person).

PERSONAL GOALS	Y/N	REASONS / LEARNING / IMPACT
#1		
#2		
#3		

Q1 PRIORITIES REVIEW

PRACTICE PRIORITY	STATUS	REASONS/LEARNINGS

PROFESSIONAL PRIORITY	STATUS	REASONS/LEARNINGS

PERSONAL PRIORITY	STATUS	REASONS/LEARNINGS

Q2 PRIORITY PLANNING

Use this section to review and select your priorities for the coming quarter's action plan.

POTENTIAL PRACTICE PRIORITIES	POTENTIAL PROFESSIONAL PRIORITIES	POTENTIAL PERSONAL PRIORITIES

Review the potential priorities above, discuss and identify the top priority in each section. This is your #1 priority for the coming quarter.

#1 PRACTICE PRIORITY	#1 PROFESSIONAL PRIORITY	#1 PERSONAL PRIORITY

Now, complete next quarters 90-Day Action Plan for the coming quarter.

2022 BUSINESS GOALS

Conduct annual strategic planning and update this page with goals and priorities for the year.

NAME: _____

YEAR: _____

GET CLEAR

	ANNUAL GOALS	Q1 ACTUAL	Q2 ACTUAL	Q3 ACTUAL	Q4 ACTUAL
Revenue					
AUM					
EBOC					
Average Fee					
Avg. Revenue/Client					
# Clients					
# Ideal Clients					
# Days Off					
Avg Work hrs/Wk					
Insert KPI#1 here					
Insert KPI#2 here					
Insert KPI#3 here					

GET FOCUSED

TOP 3 PRACTICE GOALS THIS YEAR:	WHY IT MATTERS / WHAT WILL IMPROVE?
TOP 3 PROFESSIONAL GOALS FOR THIS YEAR:	WHY IT MATTERS / WHAT WILL IMPROVE?
TOP 3 PERSONAL GOALS FOR THIS YEAR:	WHY IT MATTERS / WHAT WILL IMPROVE?

GET TO WORK

TOP 3 GOALS/OUTCOMES FOR THIS YEAR	
#1 DESIRED OUTCOME/GOALS	REASON / IMPACT
#2 DESIRED OUTCOME/GOALS	REASON / IMPACT
#3 DESIRED OUTCOME/GOALS	REASON / IMPACT

Q1 PRACTICE GOALS

PRIORITY 1	PRIORITY 2	PRIORITY 3
Key steps / Milestones	Key steps / Milestones	Key steps / Milestones

Materials, Resources, Budget Needs?

Why is this important?

What does success look like?

What challenge might be faced?

How can we prepare for / overcome them?

Q1 PROFESSIONAL GOALS

PRIORITY 1	PRIORITY 2	PRIORITY 3
Key steps / Milestones	Key steps / Milestones	Key steps / Milestones

Materials, Resources, Budget Needs?

Why is this important?

What does success look like?

What challenge might be faced?

How can we prepare for / overcome them?

Q1 PERSONAL GOALS

PRIORITY 1	PRIORITY 2	PRIORITY 3
Key steps / Milestones	Key steps / Milestones	Key steps / Milestones

Materials, Resources, Budget Needs?

Why is this important?

What does success look like?

What challenge might be faced?

How can we prepare for / overcome them?

Q1 90-DAY PLAN: Practice Goals

30-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS

40-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS

90-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS

Q1 90-DAY PLAN: Professional Goals

30-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS

40-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS

90-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS

Q1 90-DAY PLAN: Personal Goals

30-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS

40-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS

90-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS

QUARTERLY SNAPSHOT

This section tracks your Quarterly Business Review Agenda to capture key take-aways and action items.

VISION & GOALS REVIEW

Review vision and goals to maintain clarity of purpose and outcomes desired.

TASK	✓	UPDATES & NOTES
Review 3-Year Vision		
Discuss market landscape, key trends, impacts to plans		
Discuss Top 3 Wins and Top 3 Challenges		
Review 1-pg Business Plan		

FINANCIAL REVIEW

Review financial performance relative to goals.

GOALS	Y/N
Did we meet or exceed quarterly financial goals?	
Did we meet or exceed quarterly AUM goals?	
Did we meet or exceed quarterly EBOC goals?	

PRACTICE REVIEW

Identify top 3 practice wins and challenges this quarter.

3 BIGGEST WINS
1
2
3

PRACTICE GOALS	Y/N
Did we achieve Priority 1 for the quarter?	
Did we achieve Priority 2 for the quarter?	
Did we achieve Priority 3 for the quarter?	

PERFORMANCE REVIEW

Run Practice Benchmark and evaluate performance.

GOALS	Y/N
Is firm productivity where it needs to be?	
Is client revenue/profitability in line with performance goals?	
Is advisor / team productivity where it needs to be?	

PERFORMANCE REVIEW CONTINUED:

TOP 3 KPIS WE ARE MEASURING AND MANAGING TO IMPROVE. +/-	REASONS / LEARNING / IMPACT

MARKETING REVIEW

Review key marketing data to evaluate marketing progress for the quarter.

GOALS	Y/N	REASONS / LEARNING / IMPACT
Did we complete our marketing plan for the quarter?		
Did we meet our growth goals for the quarter?		

KEY MARKETING WINS	KEY MARKETING CHALLENGES
1	1
2	2
3	3

Identify top 3 practice opportunities or challenges that need attention.

PRIORITY	IMPACT	PRIORITY LEVEL	NEXT ACTION

PERSONAL GOALS

Use this section to evaluate progress toward personal goal (complete one copy for each person).

PERSONAL GOALS	Y/N	REASONS / LEARNING / IMPACT
#1		
#2		
#3		

Q1 PRIORITIES REVIEW

PRACTICE		
PRIORITY	STATUS	REASONINGS/LEARNINGS

PROFESSIONAL		
PRIORITY	STATUS	REASONINGS/LEARNINGS

PERSONAL		
PRIORITY	STATUS	REASONINGS/LEARNINGS

Q2 PRIORITY PLANNING

Use this section to review and select your priorities for the coming quarter's action plan

POTENTIAL PRACTICE PRIORITIES	POTENTIAL PROFESSIONAL PRIORITIES	POTENTIAL PERSONAL PRIORITIES

Review the potential priorities above, discuss and identify the top priority in each section. This is your #1 priority for the coming quarter.

#1 PRACTICE PRIORITY	#1 PROFESSIONAL PRIORITY	#1 PERSONAL PRIORITY

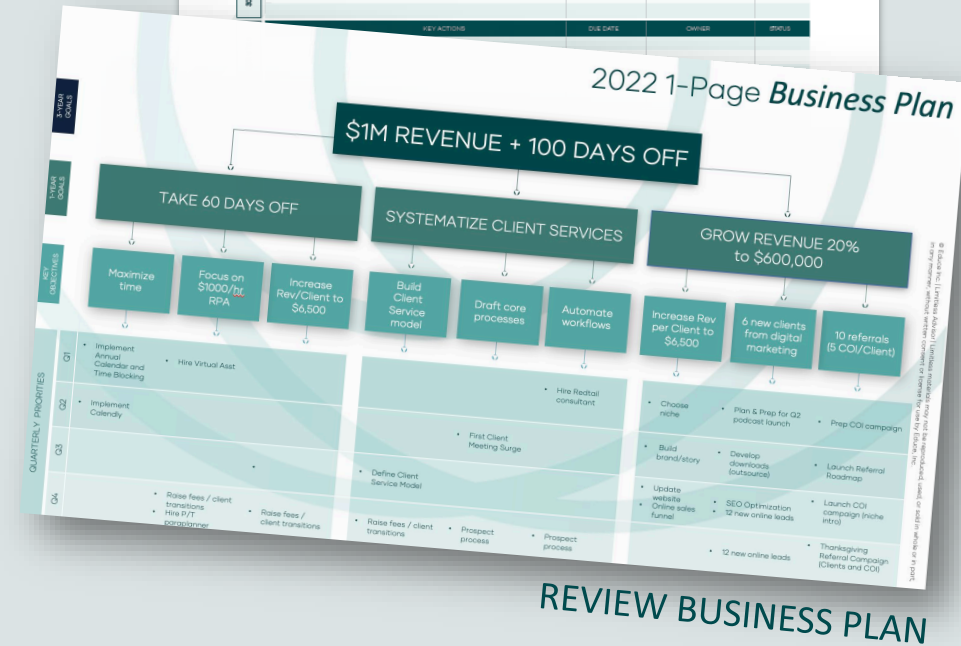
Now, complete next quarters 90-Day Action Plan for the coming quarter.

COMPLETE NEXT 90-DAY ACTION PLAN

Q1 90-DAY PLAN: Practice Goals					
90-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS

Q1 90-DAY PLAN: Professional Goals					
90-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS

Q1 90-DAY PLAN: Personal Goals					
90-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS



REVIEW BUSINESS PLAN

BEST PRACTICES

Keep these best practices in mind as you start and refine your meetings over time:



.....○ GET STARTED, THEN GET BETTER

- You don't need to figure out the perfect process, turn this into an exhaustive 3-day event or spend three hours reviewing the reports and data referenced.
- What matters most is developing a disciplined process for managing performance in line with your vision and goals.



.....○ SHARPEN YOUR AX

- Don't make excuses you're too busy and skip or shortcut meetings.
- If you're that busy, QBRs are imperative.
- Abe Lincoln said, "If I had five minutes to chop down a tree, I'd spend the first three sharpening my ax."
- Don't work with a dull ax, schedule and hold QBR meetings religiously to maintain clarity and alignment.



.....○ FOCUS ON THE ESSENTIAL FEW

- Maintain clarity of vision and what priorities will truly "move the needle" each quarter.
- Chasing shiny things and constantly shifting priorities distracts and dilutes results.
- A disciplined approach means focusing on the few priorities that can be effectively executed each quarter to maximize results.



.....○ CONSISTENCY COMPOUNDS

- You're doing more than meeting, you are building the habit of effectively managing your firm to higher standards.
- As you consistently follow the process, you and your team have greater clarity and accountability, and you have a roadmap for executing with discipline.

RIP OFF & DEPLOY, THEN REFINE

- What's on your QBR Agenda?
- Who attends your QBR?
- How long is your QBR?
- How do you prepare for QBR?
- Customize your QBR agenda to your needs and preferences
- Repeat and refine until disciplined QBR process in place
- *Progress over perfection!*





LIMITLESS Q&A