

QUARTERLY BUSINESS REVIEW WORKBOOK



LIMITLESS



Quarterly Business Review

"If I had five minutes to chop down a tree, I'd spend the first three sharpening my ax."

- Abraham Lincoln



L I M I T L E S S

The Quarterly Business Review (QBR) creates a clear and consistent structure for setting, measuring and managing quarterly plans in line with business goals. The QBR process helps you to:

- Maintain clarity, focus and accountability by managing plans in 90-day increments.
- Take a disciplined approach to setting, managing, and achieving goals.

The Quarterly Business Review is one of a series of meetings used to manage firm performance with greater skill and a disciplined approach to help your firm:

- Maintain clarity of vision in order to ensure priorities and actions align with goals.
- Evaluate and set priorities most relevant and impactful to your firm to ensure time, attention, capital and resources are best utilized.
- Gain transparency into performance and progress so you can take a professional approach to managing and improving performance.
- Create a clear understanding of the relationship between your decisions and your results.

As we like to say here at Limitless: you make results, or you make excuses. The QBR process is designed to help you set priorities and manage performance in ways that create your desired outcomes.

Now, get clear, get focused and get to work.

Managing PERFORMANCE

Annual Strategic Planning

- Update 3-year Vision
- Set Annual Goals
- Draft 1-pg Business Plan



Monthly Team Meetings



- Business Mgmt (Financials, HR, Issues)
- Business Development
- Manager/Leader Check-Ins

Quarterly Business Review

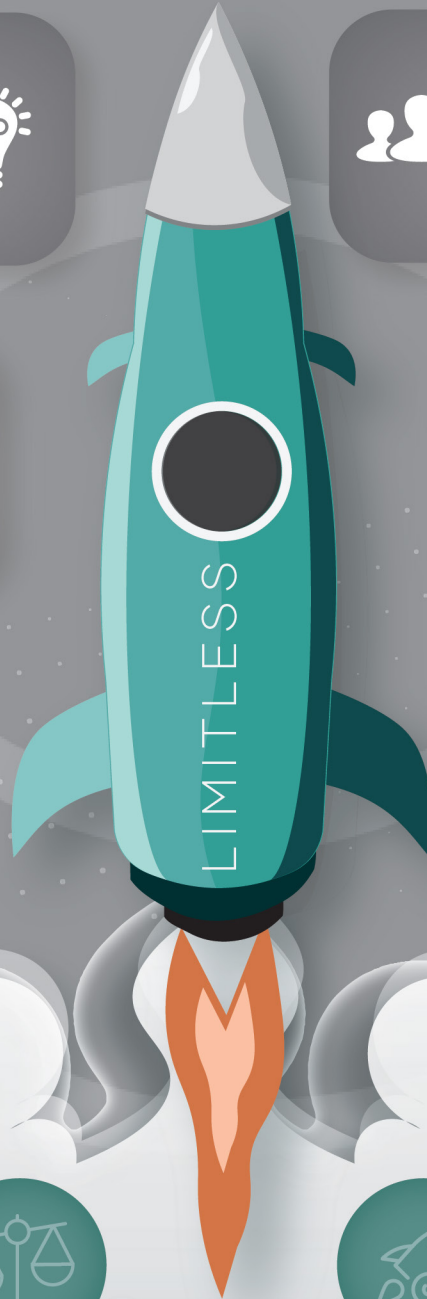
- Evaluate Firm Performance
- Review Progress toward Goals
- Set next Quarter's Priorities



Weekly Meetings



- Client Service Meeting
- Team Meeting



You can't
MANAGE

what you can't
MEASURE.

1

2

3

MANAGING FINANCIAL
PERFORMANCE

MANAGING PRACTICE
PERFORMANCE

MANAGING PRIORITIES
AND PROGRESS

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					

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/GOAL

REASON / IMPACT

#2 DESIRED OUTCOME/GOAL

REASON / IMPACT

#3 DESIRED OUTCOME/GOAL

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 challenges 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 challenges 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 challenges 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	
60-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	
60-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	
60-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	REASONS / LEARNING / IMPACT
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		3 BIGGEST CHALLENGES FACED	
1.		1.	
2.		2.	
3.		3.	

PRACTICE 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 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 goals (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 quarter's 90-Day Action Plan for the coming quarter.

Q2 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 challenges might be faced?

How can we prepare for / overcome them?

Q2 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 challenges might be faced?

How can we prepare for / overcome them?

Q2 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 challenges might be faced?

How can we prepare for / overcome them?

Q2 90-DAY PLAN: Practice Goals

30-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
60-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
90-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	

Q2 90-DAY PLAN: Professional Goals

30-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
60-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
90-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	

Q2 90-DAY PLAN: Personal Goals

30-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
60-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	REASONS / LEARNING / IMPACT
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	3 BIGGEST CHALLENGES FACED
1.	1.
2.	2.
3.	3.

PRACTICE 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 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 goals (complete one copy for each person).

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

Q2 PRIORITIES REVIEW

PRACTICE		
PRIORITY	STATUS	REASONINGS/LEARNINGS

PROFESSIONAL		
PRIORITY	STATUS	REASONINGS/LEARNINGS

PERSONAL		
PRIORITY	STATUS	REASONINGS/LEARNINGS

Q3 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 quarter's 90-Day Action Plan for the coming quarter.

Q3 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 challenges might be faced?

How can we prepare for / overcome them?

Q3 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 challenges might be faced?

How can we prepare for / overcome them?

Q3 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 challenges might be faced?

How can we prepare for / overcome them?

Q3 90-DAY PLAN: Practice Goals

30-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
60-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
90-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	

Q3 90-DAY PLAN: Professional Goals

30-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
60-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
90-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	

Q3 90-DAY PLAN: Personal Goals

30-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
60-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	REASONS / LEARNING / IMPACT
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	3 BIGGEST CHALLENGES FACED
1.	1.
2.	2.
3.	3.

PRACTICE 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 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 goals (complete one copy for each person).

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

Q3 PRIORITIES REVIEW

PRACTICE		
PRIORITY	STATUS	REASONINGS/LEARNINGS

PROFESSIONAL		
PRIORITY	STATUS	REASONINGS/LEARNINGS

PERSONAL		
PRIORITY	STATUS	REASONINGS/LEARNINGS

Q4 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 quarter's 90-Day Action Plan for the coming quarter.

Q4 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 challenges might be faced?

How can we prepare for / overcome them?

Q4 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 challenges might be faced?

How can we prepare for / overcome them?

Q4 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 challenges might be faced?

How can we prepare for / overcome them?

Q4 90-DAY PLAN: Practice Goals

30-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
60-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
90-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	

Q4 90-DAY PLAN: Professional Goals

30-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
60-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
90-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	

Q4 90-DAY PLAN: Personal Goals

30-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS	
60-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	REASONS / LEARNING / IMPACT
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	3 BIGGEST CHALLENGES FACED
1.	1.
2.	2.
3.	3.

PRACTICE 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 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 goals (complete one copy for each person).

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

Q4 PRIORITIES REVIEW

PRACTICE		
PRIORITY	STATUS	REASONINGS/LEARNINGS

PROFESSIONAL		
PRIORITY	STATUS	REASONINGS/LEARNINGS

PERSONAL		
PRIORITY	STATUS	REASONINGS/LEARNINGS

If you need additional help getting clarity on your plans or setting priorities:

- *Lifestyle-Legacy and Lifestyle-Virtual members:* please share any questions, challenges or requests for guidance on Tribe and/or Office Hours calls so we can help you stay on track. You can also attend a "Clarity Office Hours" (held post-Retreats) for specific coaching support related to mindset, vision, and goal setting.
- *Lifestyle-Live members:* share your questions, challenges or requests for guidance on Tribe and/or Office Hours calls. You can also join "Clarity Office Hours" for additional coaching support related to mindset, vision, and goal setting. If additional clarity is still needed after that, we'll set a 1:1 with Stephanie or another Coach.
- *Leaders members:* share your questions, challenges or requests for guidance on Leaders Private Lounge or Leaders Office Hours calls. Stephanie will discuss your Personal Coaching Path and your Quarterly Business Review to help you clarify and set priorities in each quarter's Strategy & Coaching Call.

If the above support doesn't get you what you need, please email coaching@limitlessfa.life so we can help you get clear, get focused and get to work building a wildly successful business and life you love.