

NEWS & EVENTS

- ✓ **November 20: Coaching Call**
9:00 AM PT Draw Your Future, Double Your Growth
- ✓ **November 27: Book Club**
11:30 AM PT *Blend Out* w/ Robert Sofia
- ✓ **November 27: Tribe Talk**
12:15 AM PT The Art of Delegation w/ Coach Adam
- ✓ **LIMITLESS 2024**
 - Dec. 15: Refer a friend to Limitless by this date to get \$1,000 off enrollment
 - RE-ENROLL BY 11/10/23 FOR FREE 6-WEEK BASE CAMP BREAKTHROUGH COURSE

FOR TODAY'S QUESTIONS
please use Zoom Q&A





BUSINESS PLANNING

LIMITLESS COACHING CALL
November 6, 2023

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



2023 1-Page Business Plan

3-YEAR GOALS

1-YEAR GOALS

KEY OBJECTIVES

\$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)

QUARTERLY PRIORITIES	Q1	Q2	Q3	Q4
	<ul style="list-style-type: none"> Implement Annual Calendar and Time Blocking Hire Virtual Asst 			
		<ul style="list-style-type: none"> Implement Calendly 		
			<ul style="list-style-type: none"> Define Client Service Model 	
				<ul style="list-style-type: none"> Raise fees / client transitions Hire P/T para planner
				<ul style="list-style-type: none"> Raise fees / client transitions
				<ul style="list-style-type: none"> Prospect process
				<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

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HABIT MEANING:

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

progress

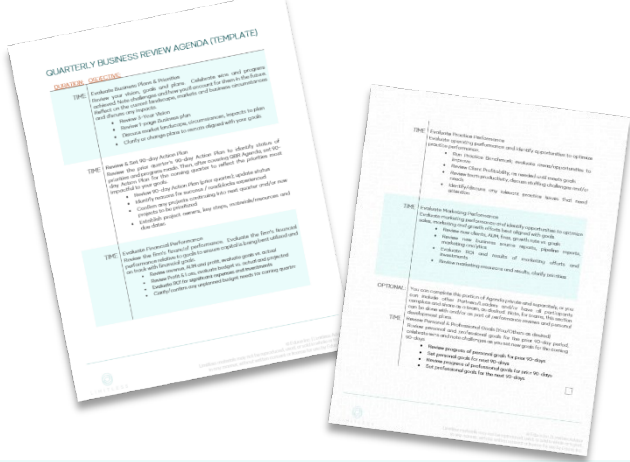
[prə'gres] noun

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 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.

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

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

- Review 90-day Action Plan (prior quarter); update status
- Identify reasons for success / roadblocks experienced
- Confirm any projects continuing into next quarter and/or new projects to be prioritized
- 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.

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

Evaluate operating performance and identify opportunities to optimize practice performance.

- Run Practice Benchmark; evaluate performance and opportunities to improve
- Review Client Profitability, as needed until meets goals
- Review team productivity, discuss staffing challenges and/or needs
- 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.

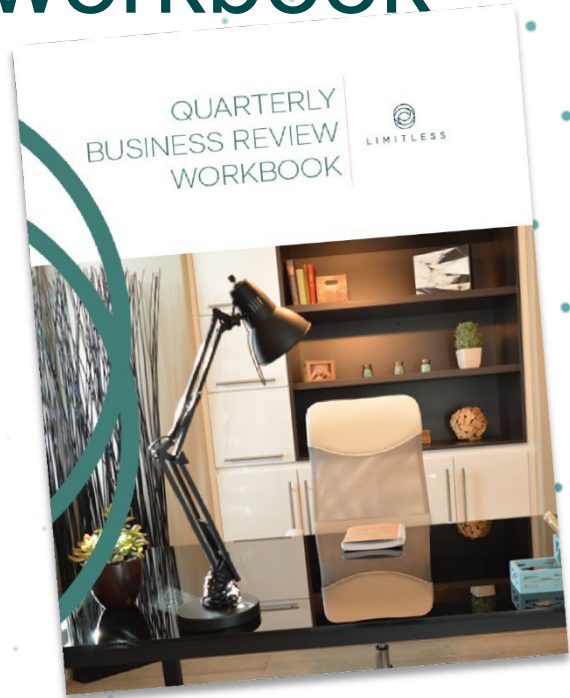
- Review new clients, AUM, fees, growth rate vs. goals
- Review new business source reports, pipeline reports, marketing analytics
- Evaluate ROI and results of marketing efforts and investments
- Review marketing resources and results, clarify priorities

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.

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



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 %/7M				
	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	STATUS	DETAILED

Q1 90-DAY PLAN: Professional Goals

BOOK DATES	PRIORITY	KEY ACTIONS	Q1 DATE	STATUS	DETAILED

Q1 90-DAY PLAN: Personal Goals

BOOK DATES	PRIORITY	KEY ACTIONS	Q1 DATE	STATUS	DETAILED

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

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

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

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

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

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

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 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

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

Q1 PRIORITIES REVIEW

PRACTICE

PRACTICE PRIORITY	STATUS	REASONS/LEARNINGS

PROFESSIONAL

PROFESSIONAL PRIORITY	STATUS	REASONS/LEARNINGS

PERSONAL

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

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.



PREPPING FOR QBR

You'll run and reference the following reports quarterly:

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

- Adviser Hours: Each client is assigned a proportion of overhead equal to the number of adviser hours required to service their account.
- Firm Hours: Each client is assigned a proportion of overhead equal to their revenue contribution.
- Revenue: Each client is assigned a proportion of overhead equal to their revenue contribution.

STEP 4: INPUT ADVISOR CAPACITY
 Input the number of hours each adviser 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 1,920 hours available capacity.

Analysis Input Data

Tier Name	Average Revenue	Current Number of Clients	New Clients	Adviser Hours	Weighting Method
Tier 1 (Alpha)	\$1,000	10	3	10	Revenue
Tier 2 (Beta)	\$500	20	5	20	Revenue
Tier 3 (Gamma)	\$250	40	10	40	Revenue
Tier 4 (Delta)	\$100	80	20	80	Revenue

Year	Revenue	Overhead	Profit	Profit Per Client
2020	\$1,000,000	\$200,000	\$800,000	\$80,000
2021	\$1,500,000	\$300,000	\$1,200,000	\$120,000
2022	\$2,000,000	\$400,000	\$1,600,000	\$160,000

Year	Revenue	Overhead	Profit	Profit Per Client
2020	\$1,000,000	\$200,000	\$800,000	\$80,000
2021	\$1,500,000	\$300,000	\$1,200,000	\$120,000
2022	\$2,000,000	\$400,000	\$1,600,000	\$160,000

THE PRACTICE BENCHMARK ANALYSIS: INPUTS & HISTORICALS

Instructions: 1. In the cells to the right, select the current year and the quarter and data. Note: results will not be accurate if the information does not match the data. 2. Quarter data from the QBR data table appears in the table 3 years and for each quarter of the current year. Note: Current year data is only for the current quarter if you do not input a value for current quarter. 3. Input year-over-year changes to evaluate historical trends. 4. Review year-over-year changes to evaluate historical trends.

	2020	2021	2022	Q1	Q2	Q3	Q4	2022 Est. Total	YOY %
Revenue	\$100,000	\$150,000	\$200,000	\$50,000	\$50,000	\$50,000	\$50,000	\$200,000	100%
Expenses	\$80,000	\$120,000	\$160,000	\$40,000	\$40,000	\$40,000	\$40,000	\$160,000	100%
Profit	\$20,000	\$30,000	\$40,000	\$10,000	\$10,000	\$10,000	\$10,000	\$40,000	100%



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 PLAN

Q1 90-DAY PLAN: Practice Goals

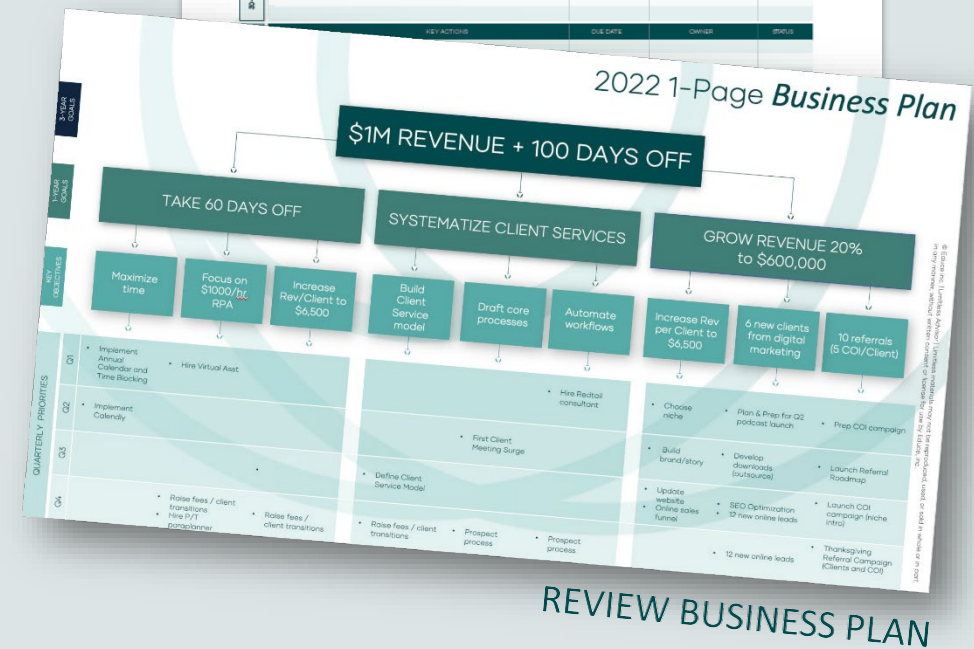
90-DAY ACTIVITIES	PRIORITY	KEY ACTIONS	DUE DATE	OWNER	STATUS

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