

A man in a yellow sweater is sitting on a grey sofa on a balcony, juggling three balls (two blue and one green). He is looking up and smiling. The balcony has a glass railing and a view of a city skyline. There are decorative teal arcs and circles overlaid on the image. The text 'MANAGING PLANS, PROJECTS & PRIORITIES' is written in white, uppercase letters on the right side of the image.

MANAGING PLANS, PROJECTS & PRIORITIES

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FROM THIS...



TO THIS...



A DISCIPLINED PROCESS

LIMITLESS LAUNCH PROCESS

A clear, simple *strategic planning* process that integrates clarity, transparency, and accountability into an effective model for defining and creating new levels of success.

ALSO WATCH:
ACTION & ACCOUNTABILITY
MANAGING FIRM PERFORMANCE
STRATEGIC PLANNING
QUARTERLY BUSINESS REVIEW



CLARITY

your what and why



TRANSPARENCY

ongoing insight into progress



ACCOUNTABILITY

ownership of results

PLANNING & PERFORMANCE MGT



STRATEGIC Planning Retreat

- Clarifies vision, goals and outcomes
- Creates clarity, investment and shared accountability

BUSINESS GOALS 201X
"Dreams don't work unless you do." -Anonymous

Firm Name: _____

Revenue (INSERT) → AUM (INSERT) → # New Clients (INSERT) → ROT (INSERT) → Days Off (INSERT) → By Date (INSERT)

ANNUAL GOALS & PRIORITIES

Annual Goals	Client	Measurement	Implementation/Action to Reach Our Goals
Revised into digital marketing strategy	2m	# Followers	• Hire digital marketing firm (2m, Q2)
Build a COI Referral Network to increase new client growth	50%	# of Referrals COI # of COI Referrals	• Build COI Touchpoint Calendar (Q1, Q4) • Implement the COI Referral Roadmap System (Q4, Q1)
Create a systematic client experience that results in 90% of 72 and client satisfaction (NPS)	90%	NPS Score (Q2) Client Satisfaction (NPS)	• Hire to hire off the open client (Q1) • Implement client preference form (Q4), Q1 • Review and improve client service process (Q1, Q2)
Establish a new minimum that aligns with firm 3-year goal	2m	% of clients that meet minimum	• Client segmentation & new onboarding (Q4, Q1) • Establish and complete a client transition plan (Q4, Q1)
Define and only work with clients who meet our ideal client profile	2m	% of client that meet ideal client profile	• Define ideal client (Q1, Q2) • Establish and complete a client transition plan (Q4, Q1)
Improve adviser capacity and align with partner personal time off goals	2m	# Practice Days (Q1)	• Establish time management, model and annual calendar (Q1, Q2)

Update this example to create your 1-page strategic plan

OUR STRATEGIC PLANNING SCHEDULE

ANNUAL STRATEGIC PLANNING MEETING
 INSERT DATE

QUARTERLY BUSINESS REVIEW
 Q1: INSERT DATE
 Q2: INSERT DATE
 Q3: INSERT DATE

WEEKLY TEAM MEETINGS
 INSERT DAY/TIME

DAILY PRACTICE
 INSERT DAY/TIME

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 Quarters Priorities
- Weekly Meetings**
 - Client Service Meeting
 - Team Meeting

You can't **MANAGE** what you can't **MEASURE.**

QUARTERLY BUSINESS REVIEW WORKBOOK

ARE WE ON TRACK?

WHY, OR WHY NOT?

WHAT NEEDS ATTENTION?

WHAT ACTION WILL WE TAKE?

PLANS | PRIORITIES | PROJECTS



PLANS LIMITLESS LESSONS

- Your Vision for Success
- Strategic Planning



PRIORITIES LIMITLESS LESSONS

- Quarterly Business Review
- Managing Performance

PROJECTS LIMITLESS LESSONS

- Asana Tribe Talks
- This One!

STRATEGIC Planning Retreat
Clarifies vision, goals and outcomes

QUARTERLY BUSINESS REVIEW WORKBOOK

BUSINESS GOALS 201X
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ANNUAL GOALS & PRIORITIES

OUR STRATEGIC PLANNING SCHEDULE

ARE WE ON TRACK?
WHY, OR WHY NOT?
WHAT NEEDS ATTENTION?
WHAT ACTION WILL WE TAKE?

Priorities Tracker

Use the below worksheet to identify your priorities for the year, current priorities in process in order to track progress and next steps. Update status by entering the corresponding value: 3 = Green/On Track, 2 = Yellow/Issues, 1 = Red/Significant Issues, 0 = Black/Not Started. As a best practice, consider using a project management technology.

INITIATIVES & STATUS

Current Quarter Initiatives	Status	Time Frame	Owner	Issues	Next Steps
Business Vision & Goals	3	Q1	Jim		Document and share with team
Service Model, Segment & Fees	2	Q2	Seh	Missing revenue data for some products, can't account for total revenue per client	
Organizational & Team Model	1	Q2	Jim		
Advisor Model & Compensation	0	Q3	Seh	Partner's out until after due date	

Upcoming Initiatives

Upcoming Initiatives	Status	Time Frame	Owner	Issues	Notes
Marketing Plan					
Business Systems					
Sales Process					

Success Shifter

HEALTH & FITNESS	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Run 30 minutes	0	0	0	0	0	0	0	0	0	0	0	0	0
Yoga 20 minutes	0	0	0	0	0	0	0	0	0	0	0	0	0
Meal prep on weekends	0	0	0	0	0	0	0	0	0	0	0	0	0
Read 30 minutes	0	0	0	0	0	0	0	0	0	0	0	0	0
Learn a new skill	0	0	0	0	0	0	0	0	0	0	0	0	0
Save \$100	0	0	0	0	0	0	0	0	0	0	0	0	0
Travel 100 miles	0	0	0	0	0	0	0	0	0	0	0	0	0
Volunteer 10 hours	0	0	0	0	0	0	0	0	0	0	0	0	0
Learn a new language	0	0	0	0	0	0	0	0	0	0	0	0	0
Read 10 books	0	0	0	0	0	0	0	0	0	0	0	0	0
Run 100 miles	0	0	0	0	0	0	0	0	0	0	0	0	0

ON PURPOSE PROJECT PLANNING

MANAGING PLANS PROJECTS

asana

CLARIFY

BUSINESS GOALS 201X

"Dreams don't work unless you do." -Anonymous

Firm Name: _____

By Date: INSERT

Revenue AUM # New Clients ROT Days Off

Work Clientical Value Time Leverage Measurement Home

This page is available in PDF worksheet. Consider using your Practice Analysis to review and set your goals.

ANNUAL GOALS & PRIORITIES

Annual Goals	Dates	Measurement	Business Objectives to Reach Check-Ins
Expand into digital marketing strategy	3m	# Followers	• Hire digital marketing firm (3m, Q3)
Build a CO Referral Network to increase new client growth	6m	# of Referrals COE # of CO Referrals	• Build CO Referral Calendar (2), Get Implement the CO Referral Roadmap System (Early Q3)
Create a systematic client experience that results in 90 and client satisfaction 9+	6m	NPS Score (Q2) Client satisfaction (9+)	• Hire to new office space (3m), Get implement client preference form (3m, Q3) Review and improve client review process (3m, Q3)
Establish a new retirement plan with 3-year good			• Client segmentation & analysis (3m, Q3)
Define and only work with client profile			
Improve outdoor client personal time off year			

QUARTERLY BUSINESS REVIEW WORKBOOK

ARE WE ON TRACK?

WHY, OR WHY NOT?

WHAT NEEDS ATTENTION?

WHAT ACTION WILL WE TAKE?

SYSTEMATIZE

Sample: Training Plan Overview

Instructions: Use this tool to map out a training plan and timeline for new employees. This plan sets up regular check-ins to review proficiency and performance of the team member. It also maps out the timeline and trainer for each training item. This sample can be used as a guide and a blank template is available on the Template tab.

LIMITLESS

Name	Jim Doe
Position	Administrative Assistant
Start Date	2/1/2021

TRAINING CHECK-IN SCHEDULE

Check-ins occur weekly for the first month, then every 30, 60 and 90 days. After that, move to quarterly check-ins. Review date should be set for each of the following check-ins. Summary notes are to be entered, including future follow-up items.

Training Check-ins	Date	Notes
Week 1	2/1/2021	introduced to most topics, just learning basics, has general office procedures down
Week 2	2/8/2021	Focusing on tech trainings in about one
Week 3	2/15/2021	Being proactive solving office problems, continue to work on mastering office
30-day	3/1/2021	introduced to most topics, just learning basics, has general office procedures down
60-day	4/3/2021	introduced to all topics, showing improvement, but needs additional training on industry specific items and paperwork support.
90-day	5/3/2021	Still needs additional training particularly related to account paperwork. Demonstrate competence on all standard administrative functions.
Qtrly Check-in	6/2/2021	What to cover also new research with members to evaluate new products or its services.
Qtrly Check-in		
Qtrly Check-in		

Example Process

WEEKLY TEAM MEETING PROCESS: SAMPLE

Owner: CSA
Description: Process for preparing for, conducting and following up after weekly team meeting
Meeting date: Every Monday at 10 - 11 am.

ACTION STEP	WHO	BY WHEN
1. Update the Weekly Team Meeting Agenda in preparation for Monday meeting. <ul style="list-style-type: none"> Act on any weekly win or shout out, these can be your own or for someone else Update the status to reflect if a priority is Green = On Track, Yellow = Issues to discuss, Red = Significant issues deadline in jeopardy Each team member adds their most critical issue for discussion to Top Issues and remaining issues to Remaining Issues 	Team Members	End of day Friday
2. Attend meeting, remembering: <ul style="list-style-type: none"> The meeting will start on time even if all team members are not present Be respectful, curious and work collaboratively to solve issues Team members are responsible for capturing their own next steps Meetings end on time, any remaining issue not discussed will be discussed in the next meeting or should be addressed in our 1:1 meetings 	Team Members	Monday in meeting
3. Follow meeting agenda: <ul style="list-style-type: none"> Priorities status check (On Track, Issue, Warning) - 5 min Top Issues (1 per team member) - 30 min Remaining Issues (everyone else) - 25 min 	Team Members	Monday in meeting
4. After meeting ends, all team members input their action items with due dates into Asana by end of day.	Team Members	Monday after meeting

INSTITUTIONALIZE

Team, Weekly Huddle

Overview List Board Timeline Calendar Dashboard More...

+ Add task

Incomplete tasks Filter 14 Sort Customize

Task name	Purpose	Assignee	Due date	Complete
THIS WEEK'S AGENDA				
Meals & Entertainment	2 @ 10	Nicole Simpson		
Off agenda planning	September 1 @ 1	Liba Vander	Aug 4	
[MTG] 2022 Launch Plan Kickoff: Team	1 @	stephanie.bogan	Tomorrow 9:00pm	On track
Tribe Talk 2021 Schedule	30 @ 26	Allison Foull		On track
Weekly Wins/Opportunities				
New Program-Ops-GSD meeting model	1 @	stephanie.bogan		
PROGRAM: BIGS				
08.25 Summer Success Series (BIG)	3 @	stephanie.bogan	Aug 25	On track
2022 Lifestyle Program (BIG)	1 @	stephanie.bogan	Today	On track
2022 Leaders Program (BIG)	1 @ 3	stephanie.bogan	Today	On track
2022 Alumni-Community Offer (BIG)	1 @	stephanie.bogan	Today	On track
2022 Member Site Build				On track
2021 September Retreat				On track

Client Process Flow Chart

1/18/2007


LEGEND: Office Activity (blue), Client Meeting (red)

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graph TD
    A["-Initial Prospect Call (with CSA)"] --> B["*Learn More* Call with Tom"]
    B --> C["-Send Interest Package (see Prospect File - Questionnaire - Cover Letter)"]
    C --> D["If 'YES' client returns Questionnaire and Statements"]
    C --> E["If 'NO' call re-schedule"]
    D --> F["Planner Document Review & Client Call"]
    F --> G["Initial Client Meeting (Tom)"]
    G --> H["Internal Workload Analysis - Prepare Recommendations"]
    H --> I["*Learn More* Meeting (Possible) Meeting #2"]
    I --> J["Engagement / Recommendation Review Meeting Meeting #3"]
    J --> K["-Improve Investment Recommendations - Process Client Paperwork"]
    J --> L["-Thank You to Referral Source"]
    K --> M["-Send New Client Welcome Kit - They Later Open"]
    M --> N["45 Day Paperwork & Team Intro Meeting"]
    N --> O["Finance"]
    N --> P["EP"]
    O --> Q["Move into Client Service Model"]
    P --> Q
  
```

STARTING IS THE HARDEST PART

PICK A PROJECT
ANY PROJECT
GET STARTED!

 **ON PURPOSE PROJECT PLANNING**

PROJECT IDEA CLARITY	Project/Focus	What is the outcome you want to achieve?	
		OUTCOME	
IMPACT	How does this project make a difference?	What's possible with success?	What's cost of inaction/compromise?
TRANSPARENCY	START:	END:	TOP 3 OBJECTIVES:
	OWNER:	BUDGET:	
	KEY MILESTONES:		1
			2
			3
SKILLS/RESOURCES/NEEDS:		MOTIVATION/REWARDS:	
ACCOUNTABILITY	SUCCESS METRICS:		
PROJECT OWNER:		DATE:	

 **LIMITLESS**
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LIMITLESS Q&A



LEARN

- The Formula for Change
Stephanie Bogan
- Take the Uncomfortable Leap
Stephanie Bogan
- Harnessing your Head Trash
Stephanie Bogan
- Mindset: New Psychology of Success
Carol Dweck
- How to Unf*ck Yourself
Gary John Bishop
- Think & Grow Rich
Napoleon Hill
- 10% Happier
Dan Harris



APPLY

- Watch
Mindset Mastery Learning Path
- Review
7 Mindsets Guidebook
- Complete
Lesson exercises/resources



ACT

- Use Success Shifter to define and reinforce new, empowering habits
- Start AM/PM Routines & Rituals
 - Morning Practice how you start your day sets your day; 10 mins day to big shifts
 - Mindfulness or meditation practice
 - Journaling
 - Vision, Goals, Big Why reflection
 - Set daily intentions
 - Evening review & reflection
- Practice "Catch & Correct"
- Attend Mindset Coaching calls