

# Limitless Advisor

## SUMMIT ACTION PLAN

Use this form to set your priorities and actions for the quarter.

NAME: .....

YEAR: .....

QUARTER: .....

### This Quarter's Priorities

#### **BIG** Priority:

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### Big Why & Desired Outcomes

Clarify the outcome you want to create, the benefits of achieving it and why it's important to you.

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ACTION 1: .....  
ACTION 2: .....  
ACTION 3: .....  
ACTION 4: .....  
ACTION 5: .....

**DUE DATE**

**OWNER**

**NOTES**

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#### **Progress** Priority:

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ACTION 1: .....  
ACTION 2: .....  
ACTION 3: .....  
ACTION 4: .....  
ACTION 5: .....

**DUE DATE**

**OWNER**

**NOTES**

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#### **Progress** Priority:

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ACTION 1: .....  
ACTION 2: .....  
ACTION 3: .....  
ACTION 4: .....  
ACTION 5: .....

**DUE DATE**

**OWNER**

**NOTES**

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Reference and use the On-Purpose Project Planner to help you effectively scope, implement and manage each priority for optimal results.

