Goals to outcomes tool.

Stay focused and productive by breaking down your big, annual goals from the **one-page business plan**. Follow the steps below to back into your top daily, weekly, monthly, and quarterly activities and goals to drive outcomes.

	5		
ILY Week of:	WEEKLY (Top priorities)	THE NEXT THREE MONTHS	QUARTERLY GOALS
on:	1.	This Month	Development activities/meetings
es:	1.	Development activities/meetings	New in pipeline
ed:	2.	New in pipeline	New AUM/revenue
urs:		New AUM/revenue	_ 1.
i:	3.	1.	
ILY Week of:	WEEKLY (Top priorities)	2.	2.
on:	1.	3.	3.
es:			ANNUAL GOALS
ed:	2.	Next Month	
urs:		Development activities/meetings	Development activities/meetings
:	3.	New in pipeline	New in pipeline
ILY Week of:	WEEKLY (Top priorities)	New AUM/revenue	New AUM/revenue
on:	1.	1.	1.
es:		2.	
ed:	2.		2.
urs:	3.	3.	3.
		2 Months Out	
:		Development activities/meetings	OUR PURPOSE AND MISSION IS TO
Week of:	WEEKLY (Top priorities)	New in pipeline	
on:	1.	New AUM/revenue	
es:		1.	
ed:	2.	2.	
urs:	2	<i>L</i> .	
:	3.	3.	



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