

# 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.

6

5

4

3

2

1

DAILY	Week of:	WEEKLY (top priorities)
Mon:		1.
Tues:		
Wed:		2.
Thurs:		
Fri:		3.

DAILY	Week of:	WEEKLY (top priorities)
Mon:		1.
Tues:		
Wed:		2.
Thurs:		
Fri:		3.

DAILY	Week of:	WEEKLY (top priorities)
Mon:		1.
Tues:		
Wed:		2.
Thurs:		
Fri:		3.

DAILY	Week of:	WEEKLY (top priorities)
Mon:		1.
Tues:		
Wed:		2.
Thurs:		
Fri:		3.

THE NEXT THREE MONTHS	
This month	
	Development activities /meetings
	New in pipeline
	New AUM/revenue
1.	
2.	
3.	
Next month	
	Development activities /meetings
	New in pipeline
	New AUM/revenue
1.	
2.	
3.	
Two months out	
	Development activities /meetings
	New in pipeline
	New AUM/revenue
1.	
2.	
3.	

QUARTERLY GOALS	
	Development activities /meetings
	New in pipeline
	New AUM/revenue
1.	
2.	
3.	
ANNUAL GOALS	
	Development activities /meetings
	New in pipeline
	New AUM/revenue
1.	
2.	
3.	
OUR PURPOSE AND MISSION IS TO...	

START HERE

## Important information.

**This is a marketing communication.**

This material is not directed to any persons where (by reason of that person's nationality, residence or otherwise) the publication or availability of this material is prohibited. Persons in respect of whom such prohibitions apply must not rely on this information in any respect whatsoever. Investment in the funds or products that are described herein are available only to intended recipients and this communication must not be relied upon or acted upon by anyone who is not an intended recipient.

This material represents an assessment of the market environment at a specific point in time and is not intended to be a forecast of future events, or a guarantee of future results. While considerable care has been taken to ensure the information contained within this document is accurate and up-to-date, no warranty is given as to the accuracy or completeness of any information and no liability is accepted for any errors or omissions in such information or any action taken on the basis of this information. The opinions and views in this commentary are of SIEL only and are subject to change. They should not be construed as investment advice.

This information is issued by SEI Investments (Europe) Limited ("SIEL") 1st Floor, Alphabeta, 14- 18 Finsbury Square, London EC2A 1BR, United Kingdom. SIEL is authorised and regulated by the Financial Conduct Authority (FRN 191713).