

Goals to Outcomes Tool.

[Need help? Watch the lesson.](#)

Work from right to left to back into your top daily, weekly, monthly, and quarterly activities and goals to drive outcomes.

Review and update weekly, monthly, or quarterly.

6
5
4
3
2
1

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

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.	
2 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



Information provided by Independent Advisor Solutions by SEI, a strategic business unit of SEI Investments Company (SEI).

Visit [SEI's Growth Lab](#), for actionable practice management advice and tools.

©2022 SEI

Goals to Outcomes Accomplishments.

Each month (or quarter) look back and capture your accomplishments. No matter how small, list the things that you and your firm accomplished or received - # of development meetings, new clients, praise, progress on a project. Acknowledge and celebrate progress. Check-in with your annual and quarterly goals, are you on track? If not, how can you get back on track or do you need to adjust?

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER

