

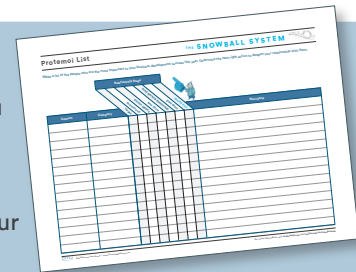


## Annually and Quarterly

This is the perfect cadence to take a few hours and review how you're doing at a high level, then to craft your focus for the upcoming year or quarter. First, tally your historic leading indicators and lagging indicators. Analyze this data for trends and summarize your results – don't sugarcoat it. Compare the data to your original goals and see what you actually accomplished. Now, look forward. Set new goals, and remember: less is more. Set your lagging indicators and then set your behavior-based leading indicators that align to your strategy in the upcoming quarter. Last tip: remember that your leading indicators should be written so that they are in your control.

## Monthly

This is the right timing to review your lagging indicators and your relationships. Are you on track with your lagging indicators like revenue, profitability or others you've chosen in your Annual and Quarterly sessions? Cross-reference your long-term strategic goals against your to-do list. What needs to change in the coming month? Also, focus on relationships: update your Protemoi List and make sure you've touched every one of your Protemoi people in a meaningful way. Add new people and delete some if needed. Most importantly, proactively invest in those you haven't yet this month.



## Weekly

Weekly is when the magic happens.

### Tactical Planning

First, do your tactical planning. Tally your prior week's MIT results and any other leading indicators you track. Document them. Update your Opportunity List and make sure you're clear on what the next step for each opportunity and what your to do is. Then, set the MITs for the week to come – three is plenty. Schedule adequate time on your calendar to do each.

Remember, rainmakers don't say "I don't have time for BD next week." Instead they ask, "how much time do I have for BD?" Even if you only have three 15-minute openings on your commute, fill those with the three Most Important Things that fit in. Always move forward using whatever time you have. No excuses.

### Pulling it all Together

Second, review your MITs to see how they relate to all the other techniques in The Snowball System. Pull in the right tools to help you succeed. Have a meeting to plan for? Download the Dynamic Meeting Prep Worksheet. Need to create some demand? Grab the Give-to-Get Brainstorming worksheet. Want to design a whole-brained meeting? Print the Whole Brain® Walkaround worksheet.

Weekly planning brings everything home. It's where the magic happens. It aligns your actions with your priorities, is where you'll hold yourself accountable, and where you'll pull in the right Snowball System tools at the right time.

Don't feel like you have to do everything in The Snowball System right away—it's too much. You'll quit before you begin. Instead of worrying about doing it all, just do the next right thing. Do that, and do it over and over again, and your snowball will start rolling on its own.

It's all downhill from here.



## Daily

Do your daily MIT at your first available opportunity.

