

**How to
Use Your
BIG
Growth
Planner**

You're Taking Control

You deserve to make an impact.

After working two or three thousand hours each and every year, you've easily invested tens of thousands of hours perfecting your craft and becoming an expert.

But that's not enough.

Just being a deep, technical expert won't steer your career in the direction you want. You'll still be reliant on others to give you work.

Top Performers add a skill to Doing the Work: *Winning the Work*.

	Doing the Work	Winning the Work		Doing the Work	Winning the Work
Clients respond	always	rarely	You give away	very little and manage to scope	as much as needed to create demand
Emails are	long and offer clarity	short and offer help	Feedback is	quick and consistent	slow and irregular
Communication is	predictable and comfortable	fluid and uncomfortable	Effort is rewarded	immediately	in the future
You win with	the best answers	the best questions	Doing the Work creates certainty for others.		Winning the Work creates possibility for others.
It's best to go in with	a full presentation	a blank page			

This planner will help you win the work you want with the clients you want. You'll get focused, and you'll stay consistent. All the little wins will start to stack, with compounding benefits.

You'll win more, and winning is a whole lot of fun. Of course, you'll make more money, which will let you accomplish all kinds of other personal goals. But the more meaningful result is the people you'll help, both inside and outside your organization.

A lot of people find us because they “need” to learn or focus more on Business Development. They probably do. But most people who thrive don't view Business Development as a “have to.” They learn to love it. Even though it's not easy at first, they find the challenge exciting. They focus on the impact they can have.

They stay focused, consistent...and ever helpful.

This planner isn't just about getting things done—it's about creating the career, business, and life you want. Every page is an opportunity to grow, build relationships, and make an impact.

We only get one shot at our career—and our life. Let's stay focused on the biggest-impact activities so we can have the biggest impact long-term.

This planner will help you do just that.

A handwritten signature in black ink that reads "Mo Bunnell". The signature is fluid and cursive, with the first name "Mo" and last name "Bunnell" clearly distinguishable.

Mo Bunnell

Founder and CEO, Bunnell Idea Group

mo.bunnell@bunnellideagroup.com

GrowBIG AI: The Best BD Ideas

This planner is designed to help you implement your most important Business Development (BD) priorities and keep you on track.

If you want help figuring out what plans to make, sign up for GrowBIG AI.

We've trained it on nearly 4 million words of our content so you can give it any situation and get the best ideas on what to do next. Then, you can document and act on those ideas with this planner.

GrowBIG AI will help you strategize. The BIG Growth Planner will keep you on track.

You can sign up at GrowBIG.ai or by scanning the QR code below.

And the best news? We're providing it at no charge.

It's our investment in your success.



Organize: Get Things Out Of Your Head

If you've read our books (*Give to Grow* or *The Snowball System*) or gone through our *GrowBIG Training* you've likely already got this step done. If not, it might take thirty minutes or so. Don't overthink this step. Focus on getting your first draft done—you can always tweak or add to these lists later.

Pro Tip: We often get asked about technologies and what works best. We've seen everything work—from 100% pen and paper to people using intense tech, tricked out with custom coding and synchronized apps. For this section, which is keeping track of all your various opportunities and relationships, use whatever works best for you. You can use our straightforward paper materials that came with this planner. Or, you can use a CRM for these two lists, using tags and reports. Either can work great. Choose whatever is seamless and fastest for you.

For those of you using pen and paper, we've included one worksheet to write down your *Protemoi* and Opportunity Lists in one place. It's titled *Protemoi and Opportunity List*.

5 How to Use Your BIG Growth Planner

Protemoi List

The first list is your Protemoi List and it focuses on relationships. A great opportunity might make your year, but a great relationship can make your entire career. Protemoi is a Greek word meaning “first among equals” and your Protemoi List is exactly that—the people most important to your future success.

Write down your most important relationships. Most professionals need ten or maybe twenty relationships to focus on at most, but rarely more than that. Think of clients who can hire you directly and those who can provide referrals to you. Referral sources can be internal or external.

Then, for each person, write down a next step that is 100% in your control that would deepen the relationship. Whether it’s to send them a thought piece they’d enjoy or an offer to catch up, focus on adding value and being helpful.

Opportunity List

The second list is your Opportunity List. Opportunities are anything where you need others to say Yes to you—where you need approval to move forward. Of course, that includes important work you want to win. But opportunities are also things like getting an important referral, speaking at a conference, and getting that promotion you’ve been gunning for. Think broadly. Write down a list of all the things you want other people to say Yes to. Then, for each one, write down a next step that’s 100% in your control and would move you closer to getting the Yes you want.

Once you’ve got these two lists documented, you’re ready to plan your quarter. Let’s get to it.

Step 1

Plan: Prioritize Your Quarter

This step should take twenty to thirty minutes.

We've found quarterly is the perfect cadence for prioritizing your time—it's long enough to push you to think strategically while short enough to make you feel a sense of urgency.

Conduct a Self-Assessment

Think of artistic events in the Olympics, like platform diving. Because those events don't have a timer or team score to know who wins, the governing bodies have developed rubrics to score athletes. They aren't perfect,

Vision	
Question	Score (1 to 5)
Have I defined the areas where my ideal clients will be spending money on services like mine in the future? Do I know where the trend in spend is going?	
Do I have a clear brand I promote internally and externally that is aligned with these areas?	
Do I have a clear BD strategy for each step in the process, from generating leads to closing deals, and do I follow it consistently?	
Do I have a vision for integrating colleagues, prospects, clients, and others I partner with in my overall business strategy?	
Total Vision Score (Max = 20)	

Measurement	
Question	Score (1 to 5)
How much new work did I generate (or play a significant role in generating) in the last quarter compared with how much I would have liked to?	
How much time did I dedicate to BD in the last quarter compared to how much I would have liked to?	
Do I have a system for measuring the leading and lagging measures of my personal BD success?	
Do I have a system for measuring the leading and lagging measures of my team's BD success?	
Total Measurement Score (Max = 20)	

Relationship	
Question	Score (1 to 5)
Have I identified—and written down—the key characteristics of my ideal clients?	
Have I used these key characteristics to identify the exact people internally and externally that I'd like to get introduced to and invest in, and have I written down those names?	
Do I have a method for investing in and being helpful to this list of most important people?	
Do I have an appropriate number of touchpoints to stay top of mind with these most important people, and do I track my touchpoints?	
Total Relationship Score (Max = 20)	

Consistency	
Question	Score (1 to 10)
Do I have an ongoing series of meetings to manage my BD like a project that I was hired to lead, including tracking progress and planning my next actions?	
Do I have an easy-to-use documentation system to manage BD actions and steps to the level I would for managing an important project I'm paid to lead?	
Do I hold myself accountable for my BD commitments?	
Do I celebrate my incremental BD successes (not just the end goal of closing business deals but also the progress toward that end) personally and with my colleagues?	
Total Efficiency Score (Max = 40)	

Grand Total
(max 100)

but they work well. We see the scoring mechanisms compare athletes against each other in one event, but athletes are also using them to track their improvements over time, across both practices and competitions.

That's what you'll do here. You'll score yourself on various aspects of your Business Development (BD) platform with the total score between 16 and 100. The first time will give you a baseline, and you can work on improving each quarter in the future.

Just follow along the prompts, being honest with each score. Mentally note where you feel you can improve. Did you notice the Consistency quadrant gets double points? That's because consistency is key. We see much more success from those investing small actions consistently than those who succumb to the "roller-coaster effect" of having slow downs and speed ups based on how busy they are. Smaller efforts done consistently will beat heroic efforts made randomly.

Total up your score. Most professionals starting out have a score of 30 to 40 out of 100. Don't worry if your score is lower than you wanted—there's hope! We've had tens of thousands of professionals fill out this assessment in our formal GrowBIG Training and Coaching work. Most get into the 70s and 80s after just a few months of consistency. If you follow the prompts in this planner, your score will improve, along with your results.

Cut to Climb

Next, fill out the Cut To Climb table.

Our brains are wired to add, not subtract, so you're much more likely to add things to your to do list than take them away. And simply adding more to an already full plate will cause it to overflow. And if you have more things to do than you have time to do them, it's likely you'll focus on shorter, less-valuable items to tick them off your list.

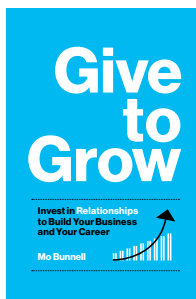
- ✓ **To add, you have to subtract.** Think of elevating your impact like climbing a ladder. The only way to climb to a higher rung on a ladder is to take your foot off a lower rung. In this metaphor, each rung of the ladder is time, and that fits because time is limited. You can't climb up to a higher rung without leaving the lowest one behind.
- ✓ **Find your fifty least valuable hours.** Shoot for finding fifty hours to eliminate, delegate, or automate each and every quarter. That's a high bar, and if you can do it, it'll reap impressive rewards. Here's how.
- ✓ **Eliminate, delegate, or automate your least valuable fifty hours.** Start with elimination. It's the most powerful because simply saying No to something is the fastest way to free up time. Maybe there's a conference you attend that is unlikely to be beneficial going forward. Just don't go to it again. Or maybe you've been investing in some relationships that can be put on the back burner. Be maniacal about your time. If you don't, no one else will. Many times, the best step is no step at all. Think back to all those great next steps you came up with when you filled out or refreshed your Opportunity and Protemoi Lists. Ask: What can you quit doing that isn't as important as acting on those ideas?

If something still needs to be done, but it's not optimal for you to do it, delegate. Try to find someone else at a lower price point who can do it. Delegation requires an up-front investment to train someone else and transfer ownership to them, but it pays dividends forever after the work is transferred. Don't fall into the "it's faster to do it myself" trap. A task might be faster to do yourself one time, but are you really only going to do it only one more time? Ask: What things

are you doing that need to be done but aren't as valuable as higher-order Business Development and relationship development activities that you'd like to do?

And finally, if something needs to be done and you must do it, try to automate. How can you use technology to speed things up? Or, how can you have someone else do most of the task if you still need to own its outcome? Automation is the final option of the three because it still requires you to own the task and get it done to your satisfaction. But that said, it can still save you a lot of time to automate it. Like delegation, it might take an up-front investment to automate something, but it's almost always worth it in the long run. Ask: Of the things that remain, how can I make them take less time for me?

Again, try to find fifty hours. It's OK if you can't—you might be highly optimized. But in going through this exercise with over 50,000 professionals in live GrowBIG Trainings, we've found nearly everyone can get close to fifty hours every quarter. We advocate for this ourselves and usually hit it.



There's much more on Cut to Climb in the "Succeed in the Long Term" chapter of *Give to Grow*.

Be broad-based in your thinking: internal meetings where you're not 100% needed, external volunteerism where you've lost your passion or it's not paying off relative to other things you can do, and relationship development efforts that made sense in the past, but not going forward. Consider cutting anything that takes up your time.

Pro Tip: Finding fifty hours isn't about finding things that aren't valuable. It's about finding the fifty least valuable hours and trusting yourself to experiment with fifty hours of new strategies.

Bet on yourself. The only way to climb quickly is to cut maniacally.

Fill Out Your Top Insights

Take three to five minutes and synthesize what you've learned. Quickly jot down your top insights in the boxes provided. One looks backward and one forward. Don't worry about writing formally—simple concepts are best because we'll incorporate these into your future goals with precision in the next step. Move quickly, looking to document the priorities you've learned.

Define This Quarter's Wins

In the first box, define this quarter's wins and how you'll know each is done. The wins might be outcome oriented (at least partially outside of your control) or input oriented (100% in your control). They can be external or internal, a hard metric focus or just a feeling. Choose whatever works for this quarter. The key is writing the goals down.

Define This Quarter's Wins

Define this quarter's wins and how you'll know each is done. They can be external or internal, a hard metric focus or just a feeling. Choose whatever works for this quarter—the key is writing the goals down.

<p>I want to accomplish...</p> <p>I'll know it's done when...</p>	<p>Quality Success Measure. This quarter, I want to get this percentage of my Most Important Things (MITs) done:</p> <p>_____ %</p> <p>I'll incorporate my team and colleagues into my plan by...</p>
<p>The growth habit or skill I'd like to focus on this quarter is...</p>	<p>Quantity Success Measure. This quarter, this is how many hours I want to invest in growth initiatives:</p> <p>_____ hours</p> <p>I'll celebrate my success by doing something just for me when I hit my goals. This quarter I will...</p>

Examples might be:

- ☑ Winning a certain \$ amount or number of pieces of new work.
- ☑ Investing a certain amount of time into coaching others in Business Development.
- ☑ Building a feeling of momentum across the team, or something very specific like testing a new “Go-to Give-to-Get” at least three times.

Next, write down the growth habit or skill you want to focus on.

Here are some examples we often see:

- ☑ Staying more consistent with your Business Development efforts.
- ☑ Leveraging your team better for relationship development.
- ☑ Getting more focused on “falling in love with the client’s problem” before talking about your expertise.
- ☑ Or, getting better at talking about your fees with confidence.

Next, you’ll calculate one quality and one quantity success measure for what you can 100% control for the quarter. We’ll call these your “leading indicators” (or inputs) that lead to the “lagging indicators” (or outputs) of bringing in the work you want.

We’ve found two leading indicators have the biggest impact. The first represents quality of effort (three Most Important Things, or MITs, a week) and the second represents quantity of effort (BD hours invested per week). Calculate the percent of MITs you want to get done this quarter. You’ll choose three MITs each week. They’ll be the three Most Important Things you’ll do for Business Development each week, and you’ll focus on getting them done before any other BD activities. We’ll show you how to choose them each week later. For now, choose the percentage you want to accomplish this quarter. Shoot for 100%! Then set a goal for how many hours you want to invest in growth activities this quarter. You’ll be tracking these each week going forward to make sure you stay focused.

If you’re having trouble figuring out *what* MITs you should do, sign up for [GrowBIG AI at GrowBIG.ai](#) or by scanning the QR code here. It’s our AI tool trained on nearly 4 million words of our content—you can give it any scenario and ask it what to do. So, if you want help with figuring out an MIT, just ask [GrowBIG.ai](#). It’s like having one of our coaches with you 24/7.



Next, we'll finish with two questions. First, write down how you'll incorporate your team into these goals. Winning major work is a team sport. How can you pull all your other internal and external partners into your plans? Finally, choose something you'll do to celebrate if you hit your goals. Be selfish. What's something you, your team, or your family could do that would be a lot of fun? Remember to be bold with this because you'll only get to do it if you hit all your goals. Maybe you can take some time off, do something fun, or buy something you wouldn't normally buy. Writing this down will give you something to look forward to.

Step 2

Act: Build Momentum Each Week

This takes about fifteen minutes a week.

Now it's time to act.

You'll fill out our weekly pages each and every week, and it's the most important fifteen minutes you'll have each week. If you don't think you have fifteen minutes, it means you're busy and have lots of client interactions, and that means the fifteen minutes of planning will be even more valuable. So, never ever skip this. No zero weeks. Weekly is also the perfect cadence because our brains think in weeks. We know what Monday mornings and Friday afternoons feel like at a young age, and we can tap into that feeling.

Week 1 Plan	Week of _____	Week 1 Reflect
<div><input type="checkbox"/> I've reviewed and updated my Opportunity and Protomoi Lists.</div> <div><input type="checkbox"/> I've reviewed my quarterly goals.</div> <div><div>Most Important Things</div><div><input type="checkbox"/> 1</div><div><input type="checkbox"/> 2</div><div><input type="checkbox"/> 3</div></div> <div><div>Habits and Skills Development: I can practice my focused habit or skill this week by...</div></div> <div><div>Leverage 34x Access</div><div><div>Meeting</div><div>Request or Recommendation</div></div></div> <div><input type="checkbox"/> I've added any needed reminders and entries to my upcoming week's calendar.</div>		<div><div>Measurement</div><div><div>Number of MITs completed:</div><div>Business Development hours:</div><div>Did I do all I could to focus on growth?</div><div><input type="checkbox"/> Yes</div><div><input type="checkbox"/> No</div></div></div> <div><div>The #1 thing I learned this week...</div></div> <div><div>I put myself in a better position to win work in the future because I...</div></div>

Pro Tip: Do your planning on the same day and same time every week. After just a few weeks, you'll find your subconscious starts filling in these forms a few hours before your scheduled time, saving you time. Pick a day and time now and schedule a recurring meeting that lasts forever in your calendar for that day and time.

1. First, open your Protemoi and Opportunity Lists and have them in front of you. If you're using paper, like our worksheets or a notebook, lay them out on your desk. If you keep these in a technology platform like a CRM, open that up and close everything else on your computer. Quickly clean up the data and make any updates needed. Focus on your biggest opportunities and relationships, especially noting the next steps for each. Check the box when you're done.
2. Do a quick scan of your quarterly goals. Note anything you might want to focus on in the upcoming week. Check the box once you've finished.
3. Now, using the above as inputs and ideas, simply choose three MITs for the next week. You'll remember MITs stands for Most Important Things. You can do far more than three BD tasks in a week if you want—but since these are the most important, you'll want to do them first. Think of this as a quality goal each week. It's a quality week when you get all three done.

Use our free
GrowBIG AI
tool create
your best MITs.
Sign up at
[GrowBIG.ai](https://growbig.ai).

As you choose your three, keep this in mind. A great MIT has three criteria that spell BIG:

- **Big Impact.** Pick the game changers, not the easy tasks. Being a little afraid of a task is a good sign.
- **In your control.** Write your MITs so they are 100% in your control. For example, write: Ask Sue to lunch. Not: Have lunch with Sue. This way you can always get three out of three. There are no excuses.
- **Growth oriented.** Have important delivery work you're on the hook for? Great, get it done. But it's not an MIT. Only choose growth-oriented tasks for your MITs—things that haven't been approved or will deepen a relationship important to you.

4. Next, fill out the habit or skill focus prompt. You can look at your calendar for the upcoming week to find opportunities to practice your chosen skill or habit with clients. If you don't have a client opportunity, think of another way to keep learning, like talking with a colleague who's great at what you're focused on, or researching the topic through a podcast, article, or book. Find a way to keep your learning going, even if it's a small step.
5. Look at the access you'll have in the upcoming week. Research out of Cornell found that face-to-face asks or requests had a 34x chance of getting a Yes than an email ask—so you have superpowers when you're with others in person and on video calls. What requests or recommendations can you make in these meetings that move things forward? Maybe an offer of helpfulness like a Give to Get? A recommendation for them to meet someone or discuss a topic? A request for them to introduce you to someone? Use being busy as an advantage. A quick thirty-second, face-to-face ask can now save you thirty minutes over email later—and they have a much higher chance of a Yes. 34x!
6. To lock in your MITs, skill or habit development, and face-to-face interactions, add reminders in your calendar. Open your calendar for the upcoming week and schedule time or set alerts for anything you want to make sure you do. If it's in your calendar, it becomes a priority. Check the box once you've done it.

You'll do the following steps *at the end* of the week. After you finish your first week, you'll add a prior week reflection to this. The rest of the weekly review is like a high-performing athlete watching film of their last game.

1. Simply tally your results and follow the prompts. This should take about five minutes. Just write down how many MITs you got done. Get 3 out of 3? Great! Get 0, 1, or 2? Do them right then or weave them into the next week.
2. Tally up how many hours you invested in BD last week. Spend a minute max on this—an estimate is fine. Just look at your prior week's calendar and write down a number. If you're +/- 10% that's fine. Those small errors will wash out over the entire quarter.
3. Next—and this is a big one—answer yes or no: Did I do all I could to focus on growth last week? This “all or nothing” score will stick with you during each

week, so put yourself in a position to get a lot of Yes's. This is important because the score incorporates everything else with the "all I could" middle of the question, so you can always get a Yes, no matter what is going on.

4. Sometimes you'll win, but you can always learn. So, now, fill in the #1 thing you learned this week. You'll be surprised how much you learn just by answering this question each week. And, you'll see trends over time. Don't overthink this one. Just jot down whatever comes to mind in a few seconds.
5. Renowned researcher Seppo Iso-Ahola studies psychological momentum in sports and business. He's found that people feel psychological momentum specifically when they're doing things they feel are putting themselves in a better position to win in the future. So, finish the prompt sentence with an action you took: I put myself in a better position to win work in the future because I... Doing this each week will build your confidence and momentum over time.

Step 3

Reflect: Look Back To Learn

Once a quarter, you'll do a deeper reflection. This should take about fifteen minutes and springboard you into the next quarter's planning.

Remember the high-performing athlete watching film after each game? That's the weekly view. Now we're going to watch highlights from the whole season—in our case, a quarter. The broader trends will come out, letting you figure out what to focus on as you enter your next quarter.

Looking Back	Looking Forward												
<p>How I feel about my accomplishments:</p> <div></div>	<p>The #1 thing I would change is...</p> <div></div>												
<p>How I improved the habit or skill I focused on:</p> <div></div>	<p>The #1 thing I need to keep doing is...</p> <div></div>												
<div><div><p>MITs Success Rate</p><table><tr><td>done</td><td>=</td><td>%</td></tr><tr><td>attempted</td><td></td><td></td></tr></table></div><div><p>Business Development Hours</p><table><tr><td>actual</td><td>=</td><td>%</td></tr><tr><td>goal</td><td></td><td></td></tr></table></div></div>	done	=	%	attempted			actual	=	%	goal			<p>I am particularly proud that...</p> <div></div> <p>The specific thing I did that I'm proud of is...</p> <div></div> <p>And the reason that action is so satisfying is because...</p> <div></div>
done	=	%											
attempted													
actual	=	%											
goal													

1. Looking Back

Start with reviewing the goals you set out to accomplish at the beginning of the quarter. How do you feel about what you accomplished? It's fine to weave in feelings about what you couldn't control. That's human nature. But pay particular attention to what you could control. How fast did you react to the changing environment? How quickly did you get going again after experiencing a setback? And don't forget—if you accomplished your goals, celebrate in the way you intended!

Next, write down how you improved in the habit or skill you wanted to focus on. It's easy to focus on perfection, like thinking, "I still need to get better at ____." Instead, focus on progress. What strides did you make? BD is a game that never ends. There's always something new. Practice doesn't make perfection, it makes progress. Write down yours.

Last, calculate your MIT completion percentage and actual vs. goal BD hours.

All these feelings and facts will help you plan ahead.

2. Looking Forward

Now that you've reviewed the season's game tape, let's look ahead to next season. Start with writing down your answer to the first two prompts: the #1 thing to change and the #1 thing to keep. These will push you to synthesize the entire last quarter into two simple concepts.

The next three questions go together. My friend Luke Burgis gave me this construct, and it's very helpful in reflections, letting you quickly dig deep into your actions. Here's some color on these three questions:

I'm particularly proud that...

Focus on your Business Development, then finish this prompt with the action you took in the last quarter that you're most proud of. Maybe it was doing something harder or faster than you would have done before this process.

The specific thing I did that I'm proud of is...

Answer this by pinpointing exactly the action you took. It's likely something very different than you would have done in the past.

And finally, answer:

And the reason that this action is so satisfying is because...

Here you should go deeper. Was the action you took satisfying because you moved past a fear you had? Because it helped someone else? Because you were brave?

Let this final exercise sink in for a moment. If you've gotten this far, you're making progress.

And if you're making progress, you're making an impact.

Celebrate your success for an hour or for a day. Bathe in how far you've come.

And remember, this isn't just a planner. It's a way of focusing on what's important, helping you make small, consistent actions that compound over time.

So get excited.

Then, after you've popped the Champagne, pull out your next quarterly planner. Let's take things to the next level, again.

11 Reasons Why the BIG Growth Planner Works

“What we make testifies who we are. People can sense care and can sense carelessness. This relates to the deep respect for each other and the end user of a product.”

— Jony Ive, former Apple Chief Design Officer

We’ve put a lot of care into the design of this planner so that you can accomplish your goals.

Every design decision we’ve made has a scientific underpinning. And understanding each one will help you implement with more precision.

Science is what gives this little planner such a big impact. It’s what lets you invest a minimum amount of time to build maximum momentum. And it’s what will give you a feeling of accomplishment, fueling your future efforts.

This planner is a powerhouse.

Here’s why.

1. Goal setting works, but it has to be done in the right way.

Researcher Edwin Locke and his conducted a meta-study of 110 goal-setting studies and found, overwhelmingly, that setting goals correlates to high performance.

In our work, we find that many people set some of the goals they need but leave the job incomplete.

Most people set goals that only focus on lagging indicators (outcomes) but rarely align them with leading indicators (inputs).

Imagine you decided to run a marathon. You wouldn't just pick a goal for a finish time (lagging indicator) and shoot for it without a plan (leading indicators). Instead, you'd do some research and build a running plan, week over week, that ramped you up to the speed and mileages you need to run in the actual race. Planning the lagging goals without breaking things down into leading indicator goals is a dream without a plan.

We've incorporated all the types of goals you need into the planner using what we've found works in training tens of thousands of professionals, incorporating longer-term quarterly goals with shorter-term weekly goals. We've balanced both quality and quantity metrics to make sure you're focused on the right things. We've made it simple for you. Just follow the prompts, do the work, and watch the results take care of themselves.

Edwin A. Locke, et al., "Goal Setting and Task Performance: 1969–1980," *Psychological Bulletin* 90, no. 1 (1981): 125–152. <https://doi.org/10.1037/0033-2909.90.1.125>.

2. Paper and pen packs a punch.

Researcher Mark Bohay and his team found that that writing notes by hand created much better memory and comprehension than typing them.

But there's a limit. We find tracking every to do with pen and paper takes too much time. It can work, but we like having an app that syncs across all our devices, lets us document notes and links, and nudges us when something's about due.

So we've incorporated "just enough" of pen and paper to help you set the highest-level priorities while giving you the flexibility to manage the minutiae through whatever systems work for you.

Mark Bohay et al., "Note Taking, Review, Memory, and Comprehension," *The American Journal of Psychology* 124, no. 1 (April 1, 2011): 63–73. doi: <https://doi.org/10.5406/amerjpsyc.124.1.0063>.

3. What we see drives decision making.

Researcher Jan Brascamp found that visual inputs drive a significant amount of our decision making. The reason we say "out of sight, out of mind" is because it's true.

The good news is that when something's in sight, you're more likely to focus on it. So, we can hack into our decision making by having a physical planner that's on our desk and carried around.

There's no doubt app-based task managers have a lot of benefits, but one detriment is that they can stay "hidden" when our devices aren't on or when they're layered behind other apps.

That's the beauty of having a pen-and-paper system, at least for higher-order executive decision making—it sits out on our desk and reminds us. We see it. We can physically "touch" our plans. There's something about having this planner that drives not only the right BD activity but more BD activity in general. Keep it out on your desk. Take it to meetings. Carry it around. Make it a symbol of growth for yourself that you can't ignore.

J. Brascamp, R. Blake, and T. Knapen, "Negligible fronto-parietal BOLD activity accompanying unreportable switches in bistable perception," *Nat Neurosci* 18 (2015): 1672–1678. <https://doi.org/10.1038/nn.4130>.

4. Doing hard things will make you happier.

Always remember—autopilot is the enemy.

Let's face it. It's easy to stay busy. Attending all the meetings you're asked to attend and answering all the emails you're asked to answer could keep you busy until you retire. Doing those things might make your "in-the-now self" happy, but they likely won't make your "year-from-now self" happy at all.

To take control of your career, you have to shift from reactive to proactive.

It seems our subconscious knows this. Researcher Tracy Cheung and her team study something called Trait Self Control, or TSC. TSC is the ability to prioritize and complete hard tasks. And guess what—they found that having high TSC predicts high levels of happiness. So, do hard things and you'll be happier.

This planner will focus your efforts on high-value, proactive strategies and actions. Do a little each week, and not only will you steer your career the way you want, but you'll feel happier about yourself too.

This is also why we incorporated the "all or nothing," yes/no question each week: Did I do all I could to focus on growth? Priorities can change even in the shortness of a single week. Including that question will get you to do the hard things each and every week, even when they're unplanned. We've found that question the most important of the bunch, because we either get to answer it fully Yes, or we feel failure. It really drives our behavior in a good way. Feel the TSC!

Pro Tip: When you can, do your MITs first in the week and/or first in the morning. We've found that tackling them as early as possible in the week and/or day puts you on a roll.

Tracy T. Cheung, et al. "Why Are People with High Self-Control Happier? The Effect of Trait Self-Control on Happiness as Mediated by Regulatory Focus." *Frontiers in Psychology* 5 (2014): <https://doi.org/10.3389/fpsyg.2014.00722>.

5. Progress creates success and happiness.

One of the many reasons Business Development is hard is because any specific effort might or might not pay off. And if it does, it's hard to know when. This randomness in outcome and timing causes a lot of people to quit because other things have a more immediate and certain reward.

The solution is to focus on what you can control and to celebrate what you've done, even if it hasn't paid off yet. You might call this reviewing a new kind of list: a "To Done" list.

Across hundreds of studies, Harvard's Teresa Amabile has led some of our favorite research. One of her insights is called The Progress Principle. She found that the most productive and happy people have one simple ritual: They celebrate incremental progress.

Let's take an example. Most people celebrate when they accomplish a goal—in our case, it might be winning some work. But what Amabile found is that the most productive and happiest people also celebrate the incremental progress toward winning the work.

We think this is especially important in Business Development because of all the uncertainty in outcome and timing. If you only celebrate what you win, it can feel random. But if you celebrate your actions toward a win, those small celebrations can become reliable. And, you'll do more of them. Focus on progress over perfection.

We've incorporated this idea into the planner in both the weekly and quarterly time frames using simple prompts. The science shows reviewing how far you've come has a high likelihood of pushing you farther. Just follow the prompts to feel a tailwind.

Teresa M. Amabile and Steven Kramer. *The Progress Principle*. Harvard Business Review Press, 2011.

6. You can harness psychological momentum.

Here's some research nicely aligned with Cheung's and Amabile's. Seppo Iso-Ahola studies the feeling of psychological momentum—the feeling that you're “on a roll.” We found something interesting in his research. One way to feel on a roll is to notice things you're doing that are putting yourself in a better position to win in the future.

We've incorporated that idea directly into the planner with a simple, weekly prompt. Jotting down what you did in the prior week that put yourself in a better position to win in the future will fuel your psychological momentum. It'll give you positive energy.

Any one week might or might not give you the results you want. Much of that is outside your control.

But if you're focused every week on enhancing your chances to win in the future? Well, that stacks. It compounds. Week over week, you'll become unstoppable. You don't have to be perfect. You just have to keep going. You just need to be more strategic and helpful than your competition. And they probably don't have this planner.

S. E. Iso-Ahola and C. O. Dotson, “Psychological Momentum: Why Success Breeds Success,” *Review of General Psychology* 18, no. 1 (2014): 19–33. <https://doi.org/10.1037/a0036406>.

7. Spaced repetition greatly enhances learning.

This is studied so much it's hard to choose a single citation. Just type in Spaced Repetition in Wikipedia for a summary. The idea is simple—that repeating something over and over with time in between correlates to recall and learning.

That's one beauty of the weekly MIT process. By thinking through your quarterly goals, Opportunity List, Protemoi List, and MITs each week, you'll bring them to the surface of your mind. You'll remember them better, and when you remember them better, you'll act on them more.

Wikipedia contributors, “Spaced Repetition,” Wikipedia, accessed May 25, 2025, https://en.wikipedia.org/wiki/Spaced_repetition.

8. Asking face to face has a 34x chance of getting a Yes.

Cornell researcher Vanessa Bohns does amazing work around influence, and one of her studies showed a face-to-face ask had a 34x better chance of getting a Yes than an email ask.

We have superpowers when we're face to face. And it doesn't matter if we are doing delivery work or in BD mode.

So, even when you're slammed with work, you can weave in little BD momentum boosters. Making a little thirty-second request while you're face to face is usually easier and more effective than spending thirty minutes crafting an email asking for the same thing later. Maybe you can ask to set up a dinner in the future or to ask for a referral later in the year. Or, you can give a recommendation like suggesting the client meet a colleague when things slow down.

A little BD effort goes a long way when you're busy. You can leverage all the access and insights you have, and your clients see you as in demand, so they value your time even more.

All this impact for little effort just takes a few minutes of planning. We incorporated this into the weekly planning process. Just look at the meetings you have in the coming week and think of the highest-impact small request or recommendation you can make. You'll find these few minutes of planning each week will be some of the most valuable time you invest in yourself.

Vanessa K. Bohns, *You Have More Influence Than You Think: How We Underestimate Our Power of Persuasion and Why It Matters*. W.W. Norton & Company, 2021.

9. Planning out what and when you'll do something enhances the chance it will happen.

Researchers David Nickerson and Todd Rogers studied what prompted people to vote. While a call encouraging people to vote had no significant impact, helping people build a plan for when and where they'd vote significantly increased that group's turnout.

This is the difference between a to-do list and a calendar. Both are important to have, but the calendar is more important. Show me what's on your calendar and I'll show you what will get done.

That's why we didn't stop at just choosing your MITs. You want to put time in your calendar to do them. You'll likely have two types of MITs. For those that are woven into meetings you are already having, add a calendar entry five minutes before to remind yourself to incorporate the MIT into your meeting. For those who require deeper work, block off the amount of time you'll think you'll need to complete it. And remember, scheduling time to do your MITs first in the week and first in the morning is best. That'll give you the best chance of getting them done before random emergencies pop up.

David W. Nickerson and Todd Rogers. "Do You Have a Voting Plan?" *Psychological Science* 21, no. 2 (2010): 194–199. <https://doi.org/10.1177/0956797609359326>.

10. You need a prompt to subtract.

Researcher Leidy Klotz has written an entire book called *Subtract: The Untapped Science of Less*.

The nut: We humans are hard-wired to add, not subtract.

Think about how many meetings you've had in the last year adding things to your plate. Just two a week would be about one hundred, and it's likely a lot more than that.

Now, how many meetings did you have in the last year to take things off your plate? Any? One or two?

The very best Top Performers are always subtracting. The more they lop off the bottom, the more they climb.

That's why we invented the Cut To Climb process and incorporated it into each quarter. It's the fast pass to success. Just follow the prompts and be maniacal about your time. If you're not, no one else will be either.

Leidy Klotz. *Subtract: The Untapped Science of Less*. Flatiron Books, 2021.

11. You'll make more of an impact.

There are so many more scientific and hard-won insights that made the planner so powerful, but we need to end somewhere. And making an impact is the perfect ending.

We often ask the highest level Top Performers we work with—the best in the world—why they love what they do.

It's always the same: They're building something special.

And the research backs this up.

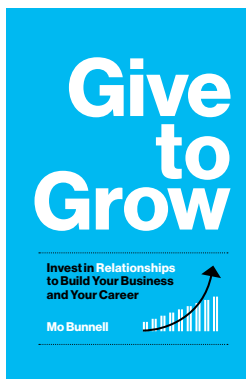
Michael Gielnik and his team looked at why successful entrepreneurs are so passionate. Most people assume it's because they were passionate about the mission, the cause, the solution they provide. That's rarely the case.

It was because they put in effort to build the business.

Doing Business Development seems hard. The results can be random at times. The payoff can take longer than expected. That's why people quit.

Use this planner to stay on track. Follow this system, and you'll put in the effort. Put in the effort, and you'll have success. And as you do, you'll build something special. Something special for your clients. Something special for your teams. And something special for you.

Michael M. Gielnik et al., "I Put in Effort, Therefore I Am Passionate": Investigating the Path from Effort to Passion in Entrepreneurship," *Academy of Management Journal* 58, no. 4 (2015): 1012–1031. <https://doi.org/10.5465/amj.2011.0727>.



Check out *Give to Grow* for More Science and Steps

If you want more on the science and steps of BD success, check out our book *Give to Grow*. It's the easiest on-ramp to all our content and nicely aligns with the BIG Growth Planner.

It's Always Your Move

A lot went into the design of the BIG Growth Planner.

Every page is a chance to plan. A chance to shape your future. A chance to improve.

We're often asked what's the difference between average and Top Performers.

It's that they're more intentional. They offer more help, more often, to the right people.

And they have agency.

They know: It's always their move, and it's always a chance to be helpful.

Use the planner to take back control.

It's always your move, and it's always a chance to be helpful.

Make your next move.

Resources to Help you Succeed

Great news!

You have several world-class, free resources to help you implement your Give to Grow Training.

- ② **If you do one thing, do this → Sign up for GrowBIG AI at [GrowBIG.ai](https://growbig.ai). It'll give you ideas for the actions you can take and document in this planner.**
- ② **Sign up for our monthly email newsletter at [GrowBIGPlaybook.com](https://growbigplaybook.com). You'll get a monthly reminder to focus on relationship development and our best content right as we release it.**
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