

One-page business plan.

Follow the steps to develop a business strategy starting with the strengths, challenges, opportunities, and threats (S.C.O.T) analysis on the back page. Use this to inform your goals, strategy, and tactics. Share with your team and review quarterly. Then use the “Goals to outcomes” worksheet to break your strategy into smaller, quarterly, monthly, weekly, and daily activities.

START BY COMPLETING A SCOT ANALYSIS

ON THE BACK

Our purpose and mission	To creatively impact the lives of our clients, their families, and their businesses through financial planning that is based on relationships, integrity, and longevity.
Our ideal clients	Business owners with at least £500K in investable assets; £1M+ if high-net-worth.
Value messaging	Comprehensive financial planning, team-based approach, holistic advice.

Current state	Annual goals	Ideal future state	
Successfully growing steadily and quickly with referrals driving most new business. Currently have more business opportunities than I can handle due to being short staffed. I have lost my work-life balance. With little systemisation in my service model/client reviews, ad hoc processes are not scalable and don't create the experience I want.	1. Expand with a lawyer and/or group insurance partner(s) - centres of influence (COIs). 2. Hire a full-time assistant for myself and possibly a junior adviser. 3. Systematise my approach to servicing clients.	My current clients have an organised and systematised service model based on their needs and client tier. Hire a full-time assistant and junior adviser to help me grow the business while developing strong partnership(s) with COIs.	
Strategies	Tactics	Owners	Metrics
Master financial planning tool and structure process to generate more quality referrals.	Set up weekly time on my calendar to dedicate to learning; one hour minimum per week.	Myself and my staff.	Double the number of financial plans I create for my clients.
Connect with new COIs.	Reach out to my connections as well as ask my best clients who they work with.	Myself and my staff.	Develop at least one COI by year-end.
Enhance my service model.	Develop business workflows and take advantage of other firm technology to create a repeatable and efficient service model.	Myself and my future staff.	Successfully scale my service model by year-end.

Key milestones	Jan	Tier my book of business.	Apr	Hire new assistant.	Jul	Evaluate service model and adjust as needed.	Oct	Staff appreciation month.
	Feb	Define new service model.	May	Begin identifying COIs.	Aug	Hire junior adviser for small accounts.	Nov	End-of-year wrap-up and business planning.
	Mar	Implement new service model.	Jun	Master financial planning tool; roll out new strategy.	Sep	Plan a prospective client event for new referrals.	Dec	End-of-year wrap-up and business planning.

One-page business plan: S.C.O.T. analysis.

Inform your strategy, tactics, and key milestones based on your goals, ideal clients, and SCOT. Review the key areas of your business: firm vision and management, people and culture, technology and operations, planning and client service, investments, business development, and change management.

What are your strengths, challenges, opportunities, and threats?

Strengths Amplify	Challenges Develop
<ol style="list-style-type: none">1. Strong sales skills are developed with a high close ratio. I feel I can effectively communicate to my clients and drive action.2. I have tools, resources, technology, investment solutions, and insurance solutions to be able to serve my clients to a high standard.3. I have a professional brand that I can build upon.4. Attend study groups and close business partnerships to stay on top of industry trends.	<ol style="list-style-type: none">1. Not enough staff to effectively service current clients and develop prospects.2. Lack of work-life balance.3. Differentiated messaging in my market.
Opportunities Capitalise	Threats Reduce
<ol style="list-style-type: none">1. Systematisation of my business.2. Scalability of my business.3. Client and prospect events.4. Client appreciation (public holidays, birthdays, anniversaries, etc.)5. Development of COIs.6. Firm technology mastery.7. Designations for where I want to focus my business.	<ol style="list-style-type: none">1. Not having the systems and people in place to systematise my business and continue to grow.2. Burnout and negativity.

Important information.

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