

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.

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START BY COMPLETING A SCOT ANALYSIS

ON THE BACK

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Our purpose and mission	
Our ideal clients	
Value messaging	

5

Current state	Annual goals	Ideal future state	
	1.		
	2.		
	3.		
Strategies	Tactics	Owners	Metrics

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Key milestones	Jan	Apr	Jul	Oct
	Feb	May	Aug	Nov
	Mar	Jun	Sept	Dec

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
Opportunities Capitalise	Threats Reduce

Important information.

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