One-Page Business Plan.

Need help? Watch the strong strategy and SMART goal lessons.

Follow the steps to develop a business strategy starting with the SCOT analysis to identify your strengths, challenges, opportunities, and threats, to inform your goals, strategy and tactic. Share with you team, review quarterly. Use the Goals to Outcomes Worksheet to break your strategy into smaller, quarterly, monthly, weekly, and daily activities.

1 START BY COMPLETING A SCOT ANALYSIS ON THE BACK

2 Our Purpose and Mission	
3 Our Ideal Clients	
4 Value Messaging	

5

Current State	Annual Goals	Ideal Future State
	1.	
	2.	
	3.	

6

Strategies	Tactics	Owners	Metrics

7

Key Milestones				
	Jan	April	July	Oct
	Feb	May	Aug	Nov
	March	June	Sept	Dec

One-Page Business Plan SCOT 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 Capitalize	**Threats** Reduce