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**	To creatively impact the lives of our clients, their families, and their businesses through financial planning that is based on relationships, integrity, and longevity.
3 **Our Ideal Clients**	500k in invest-able assets, over 1Mill of net worth, making over the Roth limit
4 **Value Messaging**	Comprehensive financial planning, team based approach, holistic advise, and professional partnership integration

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Current State	Annual Goals	Ideal Future State
Experiencing success, growing steadily and quickly, receiving many referrals, and have more business opportunities than I can handle in front of me. However, I lost my staff, so I'm doing everything myself, which causes a work	1. Start a CPA/Attorney/P&C/Group Insurance Partnership 2. Hire a full time staff for just myself 3. Create a systematized/organized service model	My current clients have an organized and systematized service model based on their needs and client tiering score. I have staff to delegate tasks that I shouldn't be doing, and my business is growing to where I should increase my minimum to 1Mill,

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Strategies	Tactics	Owners	Metrics
Master E-Money to provide a higher level of financial planning for my clients, and generate more high quality referrals.	Set up weekly time on my calendar to dedicate to learning E-Money, 1 hour minimum per week	Myself and Business partners	Each Month Have I dedicated at least 4-5 hours and I should feel more proficient
Connecting with the various professionals in goal #1	Reaching out to connections in my own circle, as well as asking my best client's whom they work with.	Myself and Business Partners	Have I created at least one solid partnership by year end
Creating an organized service model	Using and learning salesforce workflows, and other technology to create a repeatable service model I love.	Myself and my Future Staff	Have a scalable and repeatable service model by year end

7 **Key Milestones**

Jan	Tiering Book of Business	**April**	Have staff by now, if not earlier	**July**	Re-evaluate service model and make tweaks	**Oct**	Staff appreciation
Feb	Creating service model	**May**	Start talking with CPA's	**Aug**	Find a Junior Partner for clients below my minimum	**Nov**	End of Year Business
March	Implementing Service Model	**June**	Have E-Money fairly well ingrained in practice	**Sept**	Plan a client event	**Dec**	End of Year Business

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
1. Sales skills are developed, I have a very high close ratio, I feel I can effectively communicate to a client to drive them to action. 2. I have tools, resources, technology, investment solutions, insurance solutions, and expert advisor partnerships to be able to serve my clients to a high standard. 3. I have a customized brand that I can get behind and my clients can get behind 4. Study group and close business partnerships 5. Many more, lots to be thankful and appreciative for.	1. Steady Staff 2. Work Life Balance 3. Differentiation in messaging how we serve above and beyond other planners out there
Opportunities **Capitalize**	**Threats** **Reduce**
1. Systematization of my Practice 2. Scalability of my Practice 3. Client Events 4. Client Appreciation (Christmas, birthday, anniversary, etc) 5. Professional Partnerships 6. Further Technology Mastery 7. More Designations for where I want to focus my practice	1. Not getting systems and staff in place quick enough to be able to create a client service model and experience that would deter anyone from moving to another advisor that approaches them. 2. Burnout without staff