

What if I told you that your business plan only needs one page?

If you've been struggling with your planning process, you're not alone.

Advisors waste thousands of dollars in lost opportunity on creating a lengthy, complex business plan that takes months to prepare and minutes to discard on the shelf. We're not using it to do business because instead, we're excusing ourselves with staying busy.

That's about to change.

A recent Harvard Business Review survey of executives indicates that most executives report making approximately six major strategic decisions per year. Focus your planning efforts on making those six decisions. All of the rest of the decisions in your company will be much easier.

How do you simplify the planning process? Start with a quick assessment of what's working and not working in your company.

In 2022, we'll be doing this with 100 other advisors. Are you going to be one of them?

Are you ready to set goals and create a plan for them, instead of another aimless year filled with busy work?

The good news is, this entire process will only be one page, and we'll be done in your first draft in

60 – 90 minutes. Reward yourself with more of your time back!

But How?

We're here to guide you through it.

Many advisors struggle writing an impactful plan due to both writer's block and implementation strategies. We have templates that can help you start in minutes. Not hours, days or weeks. This system works because

The One Page Business Plan Is:

Documented.

Understandable.

Easy to Write.

Easy to Update.

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SO, WHAT'S THE NEXT STEP?

Complete the Foundation 2022 Surveys

To start, you'll need to get to know what works, and isn't working, in your business. This begins with 5 Assessments.

Personal Assessment

We'll begin to understand what works and isn't working for your mental health, relationships at work, life outside of work, plans for retirement, stress level, sense of community, etc.

Practice Management

We'll evaluate what works in the practice management area of your business, such as admin support, accounting and software, proposal software, computer hardware, financial profits and overall cash flow, etc.

Your Marketing Program

We'll be honest about the efforts that are working in your marketing programs, such as a profile of the ideal client, well-defined marketing niche, compelling product, COI, etc.

Your Sales Process

We'll have you rate your sales process and evaluate items such as prospect qualification, effective fact-finders, effective use of specialists, ability to deal with objections, etc.

Your Closing Process

We'll have you reflect on your closing process from several perspectives, such as defined and consistent closing processes, knowing when to close, confirming client expectations, payment processes, etc.

Without these, you'll be stuck in a loop of inspiration and deflation in your momentum to keep going.

So, what are you waiting for? Let's get started.

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How are you? A Personal Assessment (optional)

Step 1: Rate each of these elements on a scale of 1 to 10; 1 = disaster, 10 = brilliantly successful

Step 2: On page 2 identify the key elements/issues that influenced your rating.

Step 3: On page 2 make note of what needs to be changed to correct the problem areas.

1. Your Physical Health	N/A	1	2	3	4	5	6	7	8	9	10
2. Your Mental Health	N/A	1	2	3	4	5	6	7	8	9	10
3. Relationships at Work	N/A	1	2	3	4	5	6	7	8	9	10
4. Your Role at Work	N/A	1	2	3	4	5	6	7	8	9	10
5. Personal Finances	N/A	1	2	3	4	5	6	7	8	9	10
6. Life Outside of Work	N/A	1	2	3	4	5	6	7	8	9	10
7. Sense of Community	N/A	1	2	3	4	5	6	7	8	9	10
8. Plans for Retirement	N/A	1	2	3	4	5	6	7	8	9	10
9. Stress Level	N/A	1	2	3	4	5	6	7	8	9	10
10. Sense of Well Being	N/A	1	2	3	4	5	6	7	8	9	10
Overall Assessment	N/A	1	2	3	4	5	6	7	8	9	10

Step 4: As you develop your plan, be sure to come back to this page to address the issues identified here.

Where are the Opportunities for Improvement?

In left column: Identify key issues or opportunities that influenced your assessment.

In right column: Brainstorm actions that can be taken to improve low ratings or maintain high ratings.

Key Issue or Opportunity

Action to Improve or Maintain

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Example for Life Outside Work: Not having enough fun! Need some downtime!	Consider taking Mondays off, or every other Monday. Need time to rejuvenate. Spend time on the boat with family.
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Practice Management: What's Working?

Step 1: Rate each of these elements on a scale of 1 to 10; 1 = disaster, 10 = brilliantly successful

Step 2: On page 2 identify the key elements/issues that influenced your rating.

Step 3: On page 2 make note of what needs to be changed to correct the problem areas.

1. Strong Administrative Support	N/A	1	2	3	4	5	6	7	8	9	10
2. Accounting Software & System	N/A	1	2	3	4	5	6	7	8	9	10
3. Contact & Client Management System	N/A	1	2	3	4	5	6	7	8	9	10
4. Proposal Software	N/A	1	2	3	4	5	6	7	8	9	10
5. Property & Casualty/Liability Insurance	N/A	1	2	3	4	5	6	7	8	9	10
6. Business Plan & Budget	N/A	1	2	3	4	5	6	7	8	9	10
7. Benefit & Retirement Programs	N/A	1	2	3	4	5	6	7	8	9	10
8. Computer Hardware/Software	N/A	1	2	3	4	5	6	7	8	9	10
9. Business Coach/Advisor/Consultant	N/A	1	2	3	4	5	6	7	8	9	10
10. Profitable & Cash Flow Positive	N/A	1	2	3	4	5	6	7	8	9	10
Overall Assessment	N/A	1	2	3	4	5	6	7	8	9	10

Step 4: As you develop your plan, be sure to come back to this page to address the issues identified here.

Where are the Opportunities for Improvement?

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Key Issue or Opportunity

Action to Improve or Maintain

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Example for Admin Support: Buried in too much administrative duties.	Hire part-time assistant to start; within 2 years, make a full-time position.
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Your Marketing Program: What's Working?

Step 1: Rate each of these elements on a scale of 1 to 10; 1 = disaster, 10 = brilliantly successful

Step 2: On page 2 identify the key elements/issues that influenced your rating.

Step 3: On page 2 make note of what needs to be changed to correct the problem areas.

1. Profile of Ideal Client	N/A	1	2	3	4	5	6	7	8	9	10
2. Well-defined Marketing Niche	N/A	1	2	3	4	5	6	7	8	9	10
3. Well-defined Personal Brand	N/A	1	2	3	4	5	6	7	8	9	10
4. Compelling Product & Service Offerings	N/A	1	2	3	4	5	6	7	8	9	10
5. Effective Prospecting & Networking Systems	N/A	1	2	3	4	5	6	7	8	9	10
6. Client Referral Marketing System	N/A	1	2	3	4	5	6	7	8	9	10
7. Centers of Influence (COI)	N/A	1	2	3	4	5	6	7	8	9	10
8. Advertising, Promotions, Events, Seminars	N/A	1	2	3	4	5	6	7	8	9	10
9. Web Site and Other Collateral	N/A	1	2	3	4	5	6	7	8	9	10
10. Activity Tracking System	N/A	1	2	3	4	5	6	7	8	9	10
Overall Assessment	N/A	1	2	3	4	5	6	7	8	9	10

Step 4: As you develop your plan, be sure to come back to this page to address the issues identified here.

Where are the Opportunities for Improvement?

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Key Issue or Opportunity

Action to Improve or Maintain

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Example for Advertising, Promos, Events: Local newspaper advertising producing too few leads	Move to more personal forms of business development like seminars & special events.
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Your Sales Process: What's Working?

Step 1: Rate each of these elements on a scale of 1 to 10; 1 = disaster, 10 = brilliantly successful

Step 2: On page 2 identify the key elements/issues that influenced your rating.

Step 3: On page 2 make note of what needs to be changed to correct the problem areas.

1. Defined & Consistent Sales Process	N/A	1	2	3	4	5	6	7	8	9	10
2. Prospect Qualification/Needs Identification	N/A	1	2	3	4	5	6	7	8	9	10
3. Effective Fact Finder	N/A	1	2	3	4	5	6	7	8	9	10
4. Compelling Presentations & Proposals	N/A	1	2	3	4	5	6	7	8	9	10
5. Effective Use of Specialists	N/A	1	2	3	4	5	6	7	8	9	10
6. Ability to deal with Objections	N/A	1	2	3	4	5	6	7	8	9	10
7. Clearly Communicated Fee Structure	N/A	1	2	3	4	5	6	7	8	9	10
8. Future Opportunity Identification	N/A	1	2	3	4	5	6	7	8	9	10
9. Record/Track Sales Activities	N/A	1	2	3	4	5	6	7	8	9	10
10. Complaint Materials/Process	N/A	1	2	3	4	5	6	7	8	9	10
Overall Assessment	N/A	1	2	3	4	5	6	7	8	9	10

Step 4: As you develop your plan, be sure to come back to this page to address the issues identified here.

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Key Issue or Opportunity

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Example for Fact Finder: Current Fact Finder is not working; not producing the right discovery information	Collaborate with other advisors to refine Fact Finder to work with the 40 – 60 working trades population.
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Your Closing Process: What's Working?

Step 1: Rate each of these elements on a scale of 1 to 10; 1 = disaster, 10 = brilliantly successful

Step 2: On page 2 identify the key elements/issues that influenced your rating.

Step 3: On page 2 make note of what needs to be changed to correct the problem areas.

1. Defined & Consistent Closing Process	N/A	1	2	3	4	5	6	7	8	9	10
2. Know When to Close	N/A	1	2	3	4	5	6	7	8	9	10
3. Consistently Confirm Prospect's Problem	N/A	1	2	3	4	5	6	7	8	9	10
4. Confirm Client Expectations	N/A	1	2	3	4	5	6	7	8	9	10
5. Discover/Confirm Client's Budget	N/A	1	2	3	4	5	6	7	8	9	10
6. Presentation of Solution	N/A	1	2	3	4	5	6	7	8	9	10
7. Consultation with all Decision Makers	N/A	1	2	3	4	5	6	7	8	9	10
8. Ability to Deal with Objections	N/A	1	2	3	4	5	6	7	8	9	10
9. Acceptance of Offer, Getting Started	N/A	1	2	3	4	5	6	7	8	9	10
10. Payment Process, Terms, Options	N/A	1	2	3	4	5	6	7	8	9	10
Overall Assessment	N/A	1	2	3	4	5	6	7	8	9	10

Step 4: As you develop your plan, be sure to come back to this page to address the issues identified here.

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Example for Dealing with Objections: Not dealing with objections effectively.	Explore how other advisors handle similar objections. Consider taking seminar, getting mentor.
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