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**Annual Strategic Plan**

A simple guide to plan for success.

Completed by:

Completed on:

**MY VISION**

Everything we do should tie directly back to the achievement of the vision.

My vision is to…

**MY BELIEFS**

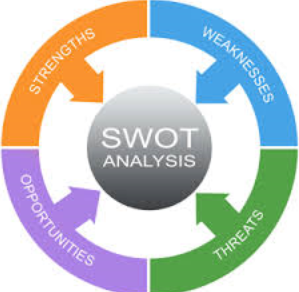
Everything we do will be carried out in accordance with our core values and beliefs.

Here is a list of the things we believe are important when carrying out our vision:



**MY TEAM**

Here are the individuals who will help us achieve our vision:

**STRATEGIC ANALYSIS**

Carefully consider our current situation, the industry environment, and other important factors in the environment to identify the following:

**Strengths**



**Weaknesses**



**Opportunities**



**Threats**



**BUSINESS DEVELOPMENT - INTERNAL**



**Client Analysis**

❑ Review our Client Classification and update if and where required

❑ Ensure all Clients are coded accurately on our CRM

❑ Update our Client Analysis Worksheet

❑ Identify how many of each client type we want to see by year end

❑ Review the referrals received last year and look for where we expect them to come from this year

**Goals:**

**Client Experience**

❑ Review our Client Service Model and fine-tune or update accordingly

❑ Order items required to execute our client service (i.e. cards, gifts, newsletters, etc.)

❑ Review our Client FORM Profiles for each of our best clients

❑ Discuss strategy to acknowledge one Moment of Truth this year for each top client

**Goals:**

**Client Onboarding**

❑ Review our New Client Onboarding Process and fine-tune or update accordingly

❑ Order items required to execute our onboarding (i.e. cards, binders, gifts, etc.)

**Goals:**

**Client Rebranding**

❑ Assess how many of our clients have been effectively rebranded

**Goals:**

**Branding**

❑ Review and update our Introduction Kit

❑ Review and update our Website

❑ Check for consistency on our Email Signatures

❑ Check for consistency on all other client-facing items (Agendas, Letters, etc.) using our Branding Standards

**Goals:**

**Office Operations**

❑ Consider ways to improve the operations for our team and clients

**Goals:**

**Office Environment**

❑ Consider ways to improve the office environment for our team and clients (new furniture, office renovations, moving spaces, etc.)

**Goals:**

**BUSINESS DEVELOPMENT - EXTERNAL**

**Professional Network – Your Strategic Alliances**

❑ Review and update those identified and coded as our Strategic Alliances

❑ Review our Strategic Alliance Service Model and fine-tune or update accordingly

❑ Ensure our Strategic Alliance Service Model is fully automated by CRM

❑ Review our Client Profiles (family, recreation, interests) for each of our Strategic Allies

**Goals:**

**Professional Network - Others**

❑ Review and update our LinkedIn Profile

❑ Identify activities related to LinkedIn to further connections consistent with our brand

❑ Leverage our other Personal Associations & Networks to attract new clients

**Goals:**

**OUR TEAM**

**Team Structure & Training**

❑ Ensure each team member has an up-to-date Job Description

❑ Identify training needs of individuals and/or the entire team

**Goals:**

**Team Communication**

❑ Continue with Weekly Team Meetings

❑ Conduct the Quarterly Strategic Meetings with the entire team

❑ Conduct the Annual Team Building & Review session with the entire team

**Goals:**

**CRM Integration**

❑ Assess level of CRM access and integration by the team

❑ Identify if team training or system upgrades is required

**Goals:**

**MY PROFITABILITY ANALYSIS**

Current Target

Investment Revenue Fixed (Fee-based, Annuitized) $ $

Investment Revenue Variable (Other) $ $

Insurance Revenue $ $

Other Revenue $ $

**TOTAL REVENUE $ $**

Current Target

HR - Variable Cost (Bonus & Incentives) $ $

HR - Training & Education $ $

Marketing – Branding (Stationary, Folders, Cards) $ $

Marketing – Gifts, Cards, Lunches & Events $ $

Marketing – Newsletters, Sponsorships, etc. $ $

Marketing – Website $ $

Technology – Software/Hardware $ $

Compliance & Licensing $ $

Courier & Postage $ $

General Office & Other Supplies $ $

Other $ $

**TOTAL EXPENSES** $ $

**TOTAL PROJECTED PROFITABILITY** $ $

**MY OTHER THOUGHTS & IDEAS**