****

**Our Annual Strategic Plan**

A simple guide to plan for success.

Completed by:

Completed on:

**YOUR VISION**

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

Your vision is to…*Click and type*

**YOUR BELIEFS**

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

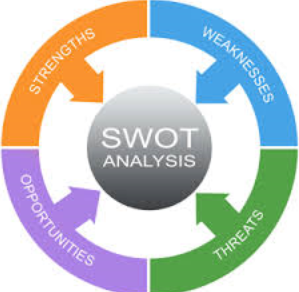
Here is a list of the things you believe are important when carrying out your vision:



**YOUR SUPPORT TEAM**

Here are the individuals who will help you achieve your vision and professional goals:



**STRATEGIC ANALYSIS**

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

**Strengths**



**Weaknesses**



**Opportunities**



**Threats**



**BUSINESS DEVELOPMENT**



**Client Analysis**

Review your Client Classification and update if and where required

Ensure all Clients are coded accurately on our CRM

Update your Client Analysis Worksheet

Identify how many of each client type you 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 your Client Service Model and fine-tune or update accordingly

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

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

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

**Goals:**



**Client Rebranding**

Assess how many of your clients have been effectively transitioned on the Wealth Continuum

**Goals:**



**Branding**

Review your Introduction Kit and update if required

Review your Website Profile and update if required

Check for consistency on your Email Signatures

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

**Goals:**



**PLANNING & COMMUNICATION**

**Your Regular Planning & Communication**

Continue with Weekly Team Meetings with self or others.

Conduct the Quarterly Strategic Meetings with self or others.

Complete the Annual Strategic Plan and take action!

**Goals:**



**CRM Integration**

Assess level of Maximizer CRM access and integration by the team

Identify if team training or system upgrades is required

**Goals:**



**YOUR OTHER THOUGHTS & IDEAS**