****

**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**