

The Intentional 1-Page Business Plan

1. Identify your motivation for the year.

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2. Know your Number.

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3. Calculate your Benchmark:

1	What's the annual number?		
2	How many weeks will I work this year?		
3	How many days will I work per week?		
4	How many hours will I work per day?		
5	Total production units	$2 \times 3 \times 4$	
	Your Per Unit Benchmark	$1 \div 5$	

4. Decide your daily NOW Activities.

List three things you will do every day that will have the biggest impact on making your number happen.

1	
2	
3	

5. Plan your FUTURE Activities?

List four long-range activities that will lay the groundwork for future business (business that will happen 3-12 months out)

1	
2	
3	
4	

6. Sharpen your tools.

List three things you will undertake to make YOU a better professional, improve your clients' experience, or strengthen your business.

1	
2	
3	

7. Find your balance.

List the three most important things you personally can spend your time doing in each of your production units.

1	
2	
3	

The Intentional 1-Page Business Plan

1. Identify your motivation for the year.

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2. Know your Number.

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3. Calculate your Benchmark:

1	What's the annual number?	<i>Pre-tax pay</i>	<i>\$1,000,000</i>
2	How many weeks will I work this year?		<i>40</i>
3	How many days will I work per week?		<i>4</i>
4	How many hours will I work per day?		<i>10</i>
5	Total production units	<i>2 x 3 x 4</i>	<i>1,600</i>
	Your Per Unit Benchmark	<i>1 ÷ 5</i>	<i>\$625/hr.</i>

4. Decide your daily NOW Activities.

List three things you will do every day that will have the biggest impact on making your number happen.

1	<i>10-outbound client calls each day.</i>
2	<i>Generate at least 1 case/proposal each day.</i>
3	<i>Time-block! Email - calls - meeting prep - meetings - calls - email. Done by 5:30.</i>

5. Plan your FUTURE Activities?

List four long-range activities that will lay the groundwork for future business (business that will happen 3-12 months out)

1	<i>Launch my social media program.</i>
2	<i>Quarterly snail-mail campaign mailed out to prospects.</i>
3	<i>Event marketing: 1 client appreciation; 3 prospecting seminars - 16 events.</i>
4	<i>Launch my podcast.</i>

6. Sharpen your tools.

List three things you will undertake to make YOU a better professional, improve your clients' experience, or strengthen your business.

1	<i>Enroll in CLU(?) designation program.</i>
2	<i>Do quarterly meetings with E4 to learn what's working, best ideas., etc</i>
3	<i>Find a mentor. Be a mentor.</i>

7. Find your balance.

List the three most important things you personally can spend your time doing in each of your production units.

1	<i>Get 1 hr of exercise at least 3x a week.</i>
2	<i>Make a list of 10 books you want to read. READ THEM!</i>
3	<i>Be present at home.</i>