

# One-page business plan.

Follow the steps to develop a business strategy starting with the S.C.O.T. analysis on the back page to identify your strengths, challenges, opportunities and threats to inform your goals, strategy and tactics. Share with your team and review quarterly. Then use the **goals to outcomes worksheet** to break your strategy into smaller, quarterly, monthly, weekly, and daily activities.

1 **START BY COMPLETING A S.C.O.T. ANALYSIS** ..... ON THE BACK .....>

2	Our purpose and mission	
3	Our ideal clients	
4	Value messaging	

Current state		Annual goals		Ideal future state	
	1.				
	2.				
	3.				
Strategies	Tactics	Owners	Metrics		

7	Key milestones	Jan	April	July	Oct
		Feb	May	Aug	Nov
		March	June	Sept	Dec

# One-page business plan: S.C.O.T. analysis.

Inform your strategy, tactics, and key milestones based on your goals, ideal clients and S.C.O.T. Review the key areas of your business: firm vision and management, people and culture, technology and operations, planning and client service, investments, business development, and change management.

What are your strengths, challenges, opportunities, and threats?

Strengths Amplify	Challenges Develop
Opportunities Capitalize	Threats Reduce



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