

# ONE PAGE BUSINESS PLAN

## MISSION STATEMENT

*Our mission is to serve the needs of our Clients, Colleagues, Carriers & Community. We do so by maintaining a laser focus on results, relationships, retention & referrals.*

## VISION STATEMENT

*Our vision is to travel a clear path to selling more, retaining more, and earning more. While exceeding all goals set and promises made. This is driven by our Culture of Accountability.*

## CRITICAL SUCCESS FACTORS

The few basic things we will do exceedingly well all the time are:

- World class client experience
- Full-time clients only
- Unique Selling System
- Non-Optional Behaviors & Strategies
- Maximize Technology
- Relentless preparation
- Power of the 80/20
- The ultimate marketing strategy
- Pipeline development
- Team member development

## KEY PERFORMANCE INDICATORS

OUTCOME STATS			PERFORMANCE STATS		
	Current	YR 3		Current	YR 3
Gross Revenue	\$3,000,000	\$4,500,000	Rev/Employee	\$125,000	\$150,000
Operating Profit	16%	25%	Rev/Relationship	\$800	\$1,500
GrowFit	21	40	Rev/Producer	\$325,000	\$500,000
			Retention	89%	96%

## THE ONE THING

The one thing that by doing it, everything else will be easier or unnecessary.

*The ultimate Marketing Strategy*