**2021 BUSINESS PLAN**

[insert name, title and company name]

**Executive summary**

This section should include:

* Review/outcomes of 2020
* What your general focus is for 2021
* Major pain points or problems to solve
* Regulatory headwinds
* Competitive landscape
* Could also include a SWOT analysis here

**2021 THEME / FOCUS**

 [insert the one thing that if you do nothing else in 2021 what MUST you do]

**Company Vision**

[insert yours here]

**Company Wildly Important Goals**

There should be no more than 1-3 WIGs – otherwise nothing gets done with excellence.

*EXAMPLES only [insert your own here]*

1. Grow FYC from 35,000 to 45,000 by December 31, 2020.

2. Hire a new office manager by March 31, 2020.

**My WIGs**

*This section is only if you have support team members or associate advisors.*

* Insert your 1-3 WIGs here

**LEAD MEASURES *(activities that will have the highest probability in reaching goals)***

**WIG #1:** Grow FYC from 35,000 to 45,000 by December 31, 2020.

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| --- | --- | --- | --- |
| **Lead Measure**  | **Implementation date** | **Dependencies - people** | **Dependencies – process, other tasks** |
| Segment existing book of business by growth opportunities. | Jan. 15, 2021. | My assistant. She will pull the list and print my book.  |  |
| Determine closest, most trusted 10 clients and ask for an introduction (need to be specific and clear on what this person “looks like”) | Jan. 31, 2021.  | n/a |  |
| Hire a marketing company to do the work to find guests for a seminar on financial planning.  | Feb. 28, 2021 | My assistant will contact Fiona to get the name of the company.  |  |
| Call all existing clients that are not contributing to an RSP and book an appointment for a review.  | January 1, 2021. | My assistant – run the report and book the appointments in January.  |  |
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**WIG #2:**

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| **Lead Measure**  | **Implementation date** | **Dependencies - people** | **Dependencies – process, other tasks** |
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**WIG #3:**

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| **Lead Measure**  | **Implementation date** | **Dependencies - people** | **Dependencies – process, other tasks** |
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**Training and development plan**

* Industry events to attend?
* What skills or behaviours do you need to hone?
* CE Credits plan
* Business Development Allowance Plan (for PC members only)