

Impact Planning Framework

<p>Dream Big Describe what your business and life look like in 10 years</p>	<p>3 Year Picture Date: Revenues: AUM: Other:</p> <p>How will it look?</p> <ul style="list-style-type: none">•••••
<p>Ideal Client Who do we serve?</p> <p>Unique Client Proposition How do we serve them?</p>	<p>Core Values:</p> <ol style="list-style-type: none">1.2.3.

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<p>Primary Growth Strategies</p> <ol style="list-style-type: none">1.2.3.	<p>One Year Plan</p> <p>Date: Revenues: AUM: Other:</p> <p>Goals for Year</p> <ol style="list-style-type: none">1.2.3.4.5.
<p>12 Week Sprint</p> <p>Date: Revenues: AUM: Other:</p> <p>Action Items</p> <ol style="list-style-type: none">1.2.3.4.5.	<p>What's getting in the way?</p> <ul style="list-style-type: none">•

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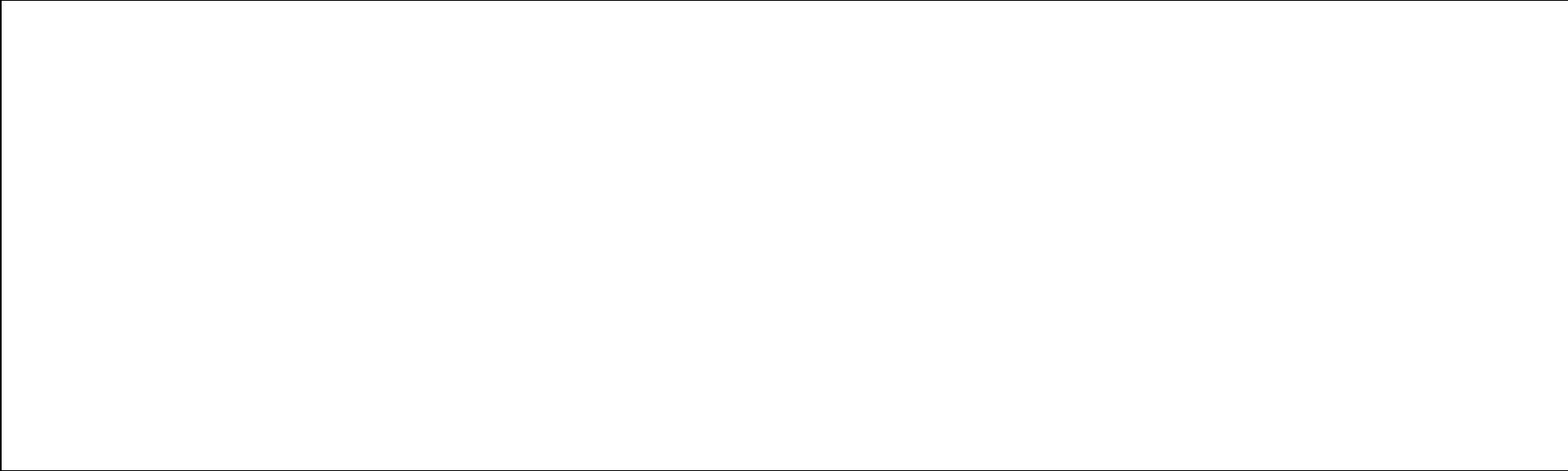
Step 2 - Key Performance Measurements (KPM)

	Where are you <u>now</u>?	What is your <u>12 month target</u>?	“Success Gap”
<u>Assets</u> under management			
<u>Ideal</u> client relationships			
<u>Active</u> prospect pipeline			
Other			
Other			

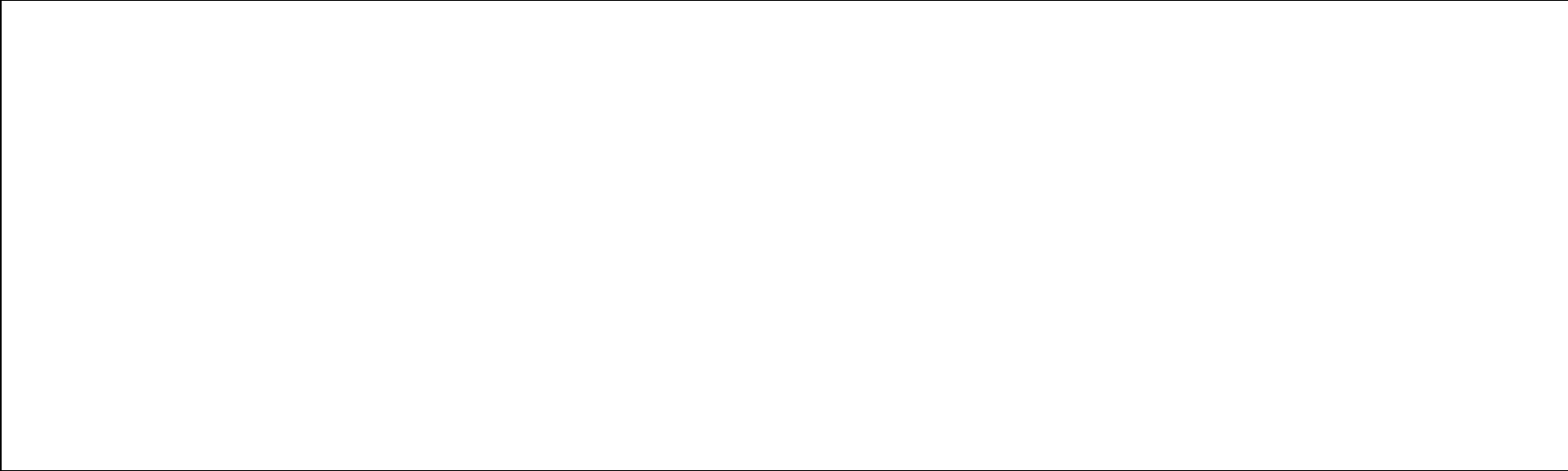
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Step 3 – Diagram of Organizational Chart
(Include Outside Partners)

Today:



In 3 Years:



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Step 4 – Big Ideas and Distractions
(What could be causing me to lose focus?)

Topic	Does this require immediate Action?