

The One Page Business Plan creates focus... and growth! We help rookies get off to a faster start and propel mid-tiers, top performers and field leadership to the next level of success. Top performers always have clear and simple plans. We know... we have been working with them for almost 20 years.

The One Page Business Plan is a proven industry best-practice! It is used by thousands of advisors, field leaders and senior executives throughout the industry as their primary business plan. It fosters strategic thinking that translates into better recruiting, higher production and increased retention.

The One Page Business Plan is reinventing leadership and learning programs across the country! GAMA's "Lead from the Front" and NAIFA's "Leadership in Life Institute" (LILI) programs are both powered by The One Page Business Plan. Dozens of public, private and corporate universities use The One Page Business Plan as a core component in their leadership and business management programs.

Getting Started is Easy with our Cloud-Based Solutions:



The One Page Business Plan Builder

Fastest, easiest way to write a business plan!

Create 1st draft in 90 minutes using interactive prompts.

Simple! No terminology or software to learn.

Designed for self-guided or team planning processes.



The One Page 90-Day Sales Planner

Start to finish in 30 minutes! No fluff, filler or complexity.

Crystal clear blueprint for achieving 90 day goals.

Creates linkage between activities, resources & goals.

Great for advisors, managers, agencies, districts, regions.



One Page Performance Management System

Best way to build & grow a high performing team.

Integrates plans, scorecards & progress reports.

Facilitates achievement of individual & team success.

Best with top producer groups, management teams.



Structured One Page Coaching Solutions

Bring out the best in everyone on your team!

Perfect framework for coaching & mentoring.

Natural add-on to existing programs is easy.

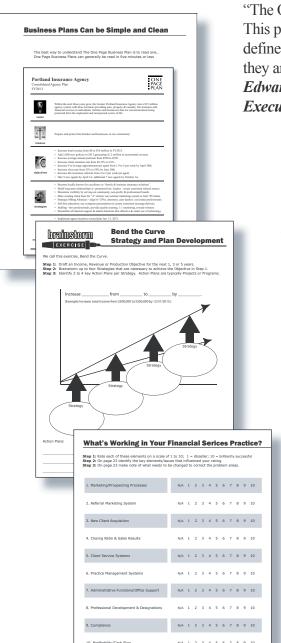
We train your trainers or provide services directly.

Call Herman Dixon at (304) 839-5101 for a Free Consultation



Help Your Team Win More Business this Year!

Since 1994, One Page Business Plans[®] have helped industry leaders improve sales, recruiting and retention...



"The One Page Business Plan is a must for all financial advisors and field leaders! This process helps an advisor clearly describe the practice they want to build and define the "critical few" objectives that need to get done and most importantly why they are doing what they do. If you want to get farther, faster, this is the tool to use!" Edward Deutschlander, CLU, CLF

Executive Vice President, North Star Resource Group

"The One Page Business Plan process is like none other I have experienced." Our leadership team participated, with each one designing their own plan. The result being each leader is engaged, empowered and has ownership of a plan with his/her best thinking. I highly endorse One Page Business Plan."

Bob Fashano CLU, CHFS, MSFS General Agent - The Guardian, Master Agency

"We used the One Page Plan process to turn a four inch stack of research and surveys into a five-year strategic plan, and one-year plans for every department and committee. Every financial service company would benefit from running their business with this level of precision."

Jeff Hughes

Chief Executive Officer, GAMA International

"The One Page Business Plan helps new and old agents, advisors, field managers, sales executives and managing partners cut though the minutia of most planning processes. One Page Plans require critical thinking; this process creates solid plans!

Herman Dixon, CLU, CLF, LTCP, MBA State Farm Agency Field Executive

"The One Page Business Plan process works! It's not an event, it's a method that keeps us focused on the right things every day! As a result we're having another great year! Call me at (212) 261-1810 and I will be glad to share my experience with this simple, disciplined and very powerful practice."

Howard Elias, CEO, Wealth Advisory Group GAMA International, President Elect 2013 - 2014