



**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**



**The One Page Business Plan Company**

*A GAMA Gold Resource Partner*

# 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 Deuschlander, 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 through 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*

**Business Plans Can be Simple and Clean**

The best way to understand The One Page Business Plan is to read one. One Page Business Plans can generally be read in five minutes or less.

**Portland Insurance Agency**  
Consolidated Agency Plan  
FY2013

Within the next three years, the Greater Portland Insurance Agency will be a \$15 million agency, growing with three business divisions: Property & Casualty, Life Insurance and Financial Services. The agency will be a leader in the industry, providing the highest quality service to its clients.

**mission**  
Prepare and protect the families and businesses in our community.

**objectives**

- Increase total revenue from \$8 to \$10 million in FY2013.
- Add 2,000 new policies in 2013, increasing 15% in commercial revenue.
- Increase average annual premium from \$100 to \$120.
- Increase client retention rate from 85% to 90%.
- Increase client satisfaction score from 7.5 to 8.5 per year by April 2013.
- Increase client retention rate from 85% to 90% by June 2013.
- Increase life insurance volume from \$1 to \$2 million per year.
- Hire 3 new agents by April 1st, additional 7 new agents by October 1st.

**strategies**

- Recruit locally known for excellence in "Best & Business Insurance Solutions".
- Build long-term relationships with potential new business owners and advisors.
- Maximize visibility by serving as community, non-profit, & professional leaders.
- Maximize client base for "360" clients, one source, multiple services in real time.
- Strategic Marketing Alliance - align with CFPs, attorneys, state doctors, real estate professionals.
- Sell for objectives, one company, professional services, consistent messaging delivery.
- Staffing - hire professionals, provide quality training, 11 mentoring, record reviews.
- Streamline all internal support & administrative functions, efficient & cost-effective technology.
- Supplement agent resources with local, state, & national resources.

**What's Working in Your Financial Services Practice?**

Step 1: Rate each of these elements on a scale of 1 to 10: 1 = disaster; 10 = brilliantly successful.  
Step 2: On page 23 identify the key elements/issues that influenced your rating.  
Step 3: On page 23 make note of what needs to be changed to correct the problem areas.

	1	2	3	4	5	6	7	8	9	10	
1. Marketing/Prospecting Processes	N/A										
2. Referral Marketing System	N/A										
3. New Client Acquisition	N/A										
4. Closing Ratio & Sales Results	N/A										
5. Client Service Systems	N/A										
6. Practice Management Systems	N/A										
7. Administrative Functions/Office Support	N/A										
8. Professional Development & Designations	N/A										
9. Compliance	N/A										
10. Profitability/Cash Flow	N/A										
Overall Assessment		1	2	3	4	5	6	7	8	9	10

Step 4: As you develop your plan, be sure to come back to this page to address the issues identified here.

**There are many affordable ways to implement The One Page Business Plan in your company!**



**The One Page Business Plan Company**

www.onepagebusinessplan.com/gama (304) 839-5101