

Practice Development Series

Module 1: Business Planning / Activity 2: Business Definition

Aligned with the PFA™ Designation Program

Instructions: Begin to create your business plan by defining your business using the template that follows. Review the examples of vision, mission and value statements found in Module 1, Business Planning. Scroll down to ensure you see the full template.

Note: You can create section headings in your completed activity to represent each topic area.

Business Plan - Business Definition	
Define Vision – A vision statement describes a perfect day in the life of your practice three to five years from today: How do you feel? How much do you work? Who works with you? What kind of clients do you have and what kind of problems are you skilled at solving?	Vision:
Define Mission – A mission statement captures the essence of your practice and quickly communicates your objectives to others.	Mission:
Define Values – Values are what we believe in, the principles we live by and the things we stand for.	Values:

