

Annual Business Plan

Personal Goal:

Previous Year Statistics

Closing Ratio: _____

Total Revenue: _____

Revenue Per Unit: _____

Appointments Per Week: _____

Goal Statistics

Closing Ratio: _____

Revenue Per Unit: _____

Appointments Per Week: _____

Estimated Weeks Worked: _____

Goal:

_____ x _____ x _____ x _____ = _____
Closing Ratio Appointments Revenue per Unit Weeks Worked Annual Revenue

Stretch Goal:

_____ x _____ x _____ x _____ = _____
Closing Ratio Appointments Revenue per Unit Weeks Worked Annual Revenue



Daily Plan

What structured activity will you add to your business plan to achieve your stretch goal?

- Join a Networking Group
- Current Client Monthly Newsletter
- Referral Contest for Networking Partners
- Structured Telemarketing
 - New Business Lists
 - 20 employees and above
 - Lost Clients/ No Sales/ etc.

1.
2.
3.
Professional Goal:

Signature

Date

