

2016 Review



FINANCIAL	<i>Did you have a 2016 Goal?</i>	<i>2015 Result</i>	<i>2016 Goal</i>	<i>2016 Results or Estimate</i>	<i>Percent of Goal Reached</i>
Business Revenue					
Net Profit (EBITDA)					
Personal Income					

Client Acquisition & Retention

New Clients Added					
Client Retention %					

Sales & Marketing Conversion Performance

Lead Quantity					
Conversion % to Sales					

Per Client Sales & Profit

Per client revenue					
Per client margin					

BUSINESS REVIEW

1. List 3-5 major business accomplishments this year:

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2. About what do you feel most effective and successful? Why? Were any accomplishments BREAKTHROUGH?

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3. What did you not complete, finish or accomplish that you had wanted to?

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4. What got in your way? What obstacles or challenges did you face? How did you handle them?
What did you learn about yourself? What did you learn about others?

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5. What Business goals from this year will you take into next year with you? How will you handle them differently?

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PERSONAL REVIEW

6. List 3 personal accomplishments this year:

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7. About what do you feel most effective and successful? Why?

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8. What did you not begin or complete that you wanted to? What got in your way?

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SUMMARY

9. As you look back at this year, what accomplishments stand out for you?
What did your team, organization and family accomplish that stands out for you? Any surprises?

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2017 Goals

	2017 GOAL	2016 Result
FINANCIAL		
Business Revenue		
Net Profit (EBITDA)		
Personal Income		

Client Acquisition & Retention

New Clients Added		
Client Retention %		

Sales & Marketing Conversion Performance

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2017 Planning Guide



My Mission Statement is:

List 5 Business Goals for the new year (Include 1 “stretch” or breakthrough goal):

How will you accomplish these goals? What actions will you take? What consistent practices will you put into place?
How often? At what frequency or intervals?

What changes will you make in order to achieve these goals? What beliefs and behaviors will you challenge and change?
What might get in your way?

What can your team/organization/clients count on from you?

What are your goals for next year?

What advice/coaching do you have for yourself?

List 3 Personal goals or accomplishments for the new year:

How could you improve each Goal category (from Chart):

Revenue/Net/Personal Income	
New Clients added/ retained	
Increase Leads	
Higher Lead Conversion	
Greater per-client revenue & margin	