2006 YEAR-END REVIEW

2006 Planning Goals

REVENUE
Annual Revenue Goal: _____
Actual Annual Revenue: _____

Monthly Revenue Goal: _____
Actual Monthly Revenue (Avg): _____

OTHER GOALS:
Long-Term Objectives: _____
_____
_____
_____
_____

Five Key Strategies and Progress Toward Achieving Them: _____

Short-Term Goals:

Activities We Implemented to Achieve Short-Term Goals & Results:

CURRENT PRACTICE POSITION:

REVENUE
Revenue by Source

SOURCE	REVENUE ($)	% OF TOTAL

Revenue by Type of Business:

SERVICE	TOTAL $	% OF TOTAL

$ in Accounts Receivable > 30 days: _____

$ in Pending Sales: _____

Closing Ratio: _____

Length of Sales Cycle: _____

Average fee per client: _____

Prospect Acquisition Cost: _____

Most Active Referral Sources: _____

Most Profitable Referral Sources:_____

Summary

What was successful? What failed? Where would you make changes?