

3 Year Rolling Business Development Plan Worksheet

Date completed: _____

Review date: _____

Stats	Current Year	Prior Year	Year 1	Year 2	Year 3	*Benchmark stats
Productivity						
Premium						
Revenue						
# Clients						
Avg. Rev per client						
Retention						
Revenue						
New business revenue						
Renewal revenue						
Acquired revenue						
Organic growth						
Total growth						
New business revenue						
Financial						
# Full-time employees						
Avg. revenue per FTE						

*Benchmark results of firms of a similar size