

Personal Growth Plan Worksheet

For: _____ **Division:** _____

From: _____ **To:** _____

Performance Goal	Target	Prior Year	YTD results
Premium			
Revenue			
No. Clients			
Retention			

Existing clients	Monthly target	Year to date results	Prior year results
New business premium			
Income			
Referrals			
Lost client's revenue			
Retention			
Pipeline building			
# Referrals			
# Introductions			
# Leads			
# Suspects			
# prospective clients			
Pipeline estimated revenue			
Target account wish list			
# of accounts			