

Marketing Planner

I. Portfolio Overview

Gross Revenue	\$		
Total Number of Clients			
Average Revenue Per Client	\$		
Category	No. of Clients	% Total Revenue	Ave. Rev. Per Client
Top 5%		%	\$
Middle 15%		%	\$
Bottom 80%		%	\$

Existing Client Plans

II. Growth Goals

	1	2	3
Revenue	\$	\$	\$
Retention			
Number of Clients			
Conversion Ratio			
Closing Ratio			

Name:

III. Top 20% Client Evaluation

Number of Full-Time Clients	
Number of Relationship Concerns	
Top 20% Client Plan	

IV. Niche Market

Market	% Revenue	No. of Clients	Total Revenue
1.	%		\$
2.	%		\$
3.	%		\$
4.	%		\$
5.	%		\$

V. Priorities and Focus

Priorities	% Of Times
Client Retention	%
Referrals	%
New Business	%
Cross-selling	%