

SALES VELOCITY WORKSHEET

#1	2024 New Business Revenue	\$
#2	2023 Total Revenue and Fees	\$
#3	Sale Velocity Score (#1 ÷ #2)	%

CALCULATING YOUR RESULTS

In column 1, list your current new business revenue results
In column 2, list your prior year's total revenue (fees and commissions)
Divide column 1 by column 2 to calculate your Sales Velocity

EXAMPLE

2024 New Business Revenue = \$250,000

2023 Total Revenue = \$2,000,000

Sales Velocity score would be calculated as $\$250,000 \div \$2,000,000 = 12.5\%$

YOUR SCORE

Sales Velocity	Analysis	Strategies
12%+ Healthy	A score in this range indicates that your current strategies are strong, but continued monitoring and market exploration are crucial to maintain and enhance growth. Regular reviews of your sales tactics and client engagement strategies are recommended.	Although this score indicates strength, brokers should continue to fine-tune their strategies and explore new markets to sustain this growth.
10-12% Vulnerable	You're in a potentially risky zone. In this range, brokers should consider refining their client acquisition and retention strategies to improve new business flow	Brokers in this range should also consider increasing the frequency of lead-generation activities to build a stronger pipeline of new business.
<9% Urgent	This low score is a red flag. Consider implementing targeted marketing campaigns, increasing touchpoints with prospective clients, and refining your value proposition to address the unique needs of your market.	Firms in this range should consider revisiting their entire sales process, possibly seeking outside consultation or support to turn things around.

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Calculating your Sales Velocity at least annually helps to track trends, set growth targets, and adjust strategies as needed.

Take control of your business today by regularly monitoring and improving your Sales Velocity, you can stay ahead in an increasingly competitive landscape.

Apply these strategies today to ensure your business not only survives but thrives in any market condition.

How I Can Help

I'm Clifton Warren, principal of Clifton Warren Consulting, a leading firm specializing in helping insurance brokers and financial services professionals achieve consistent growth. With over two decades of experience, I've helped insurance brokerage firms boost their sales capabilities, strengthen client relationships, and accelerate business growth through tailored strategies focused on acquiring, retaining, and developing clients.

Next Steps

Ready to take your business to the next level? Let's explore how I can help improve your sales velocity and drive growth. Reach out to me directly at clifton@cliftonwarren.com to schedule a conversation.