

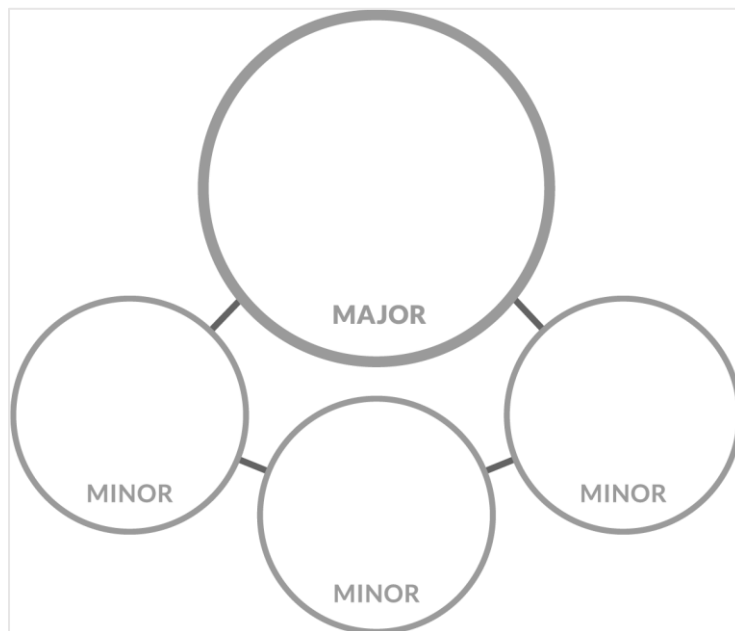
Key Goals & Milestones

This section outlines key goals and milestones for the year. This is the strategic snapshot of what you want your book of business or territory to look like at year end.

Vision for the Year	[What will my book of business or territory look like at year end?]
Revenue	[Revenue goals in key verticals, service lines or product categories. May be broken down quarterly.]
Profit	[Bottom-line growth in key verticals, service lines or product categories. May be broken down quarterly.]
New Client Growth	[Number and description of new clients you are aiming to add to your book of business. Ideally categorized by vertical.]
Current Client Growth	[Number and description of current clients you are aiming to grow. Categorized by vertical. Potential supporting document from CRM with actuals per key client.]
Gamechanger Goal	[What is a stretch goal for you this year that would be a gamechanger?]

Target Verticals

- In looking at your client set today, where do you see vertical majors and minors? (Example: Healthcare may be your major; home health or nursing facilities may be your minors.)
- In which verticals have I already established expertise?
- What verticals do I have a passion for or an interest in going deeper into?
- What verticals will have the greatest opportunities over the next 1 - 3 years?



Target Accounts (per Vertical)

What are your top 20 accounts / clients per vertical? This may also be tracked in your CRM.

	[Major / Minor]
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	

Intelligence: Verticals

The Intelligence grid below is adapted for a vertical-level view.

	<p>Industry Trends</p>
	<p>Challenges</p>
	<p>Key Industry Initiatives</p>

Intelligence: Client / Account Level

The Intelligence grid below is adapted for the client / account-level view.

	<p>Trends</p>
	<p>Leadership Vision</p>
	<p>Challenges</p>
	<p>Key Initiatives</p>
	<p>Fiscal Year Goals</p>

Decision Maker Personas

For each major and minor, you may have unique decision-maker personas.

	[Major / Minor]
Name & Role	
Top responsibilities	
What is the decision maker measured on?	
What are the key challenges facing this decision maker?	
What is happening inside his/her firm / company?	
What will make change difficult?	
What motivates this decision maker?	
What does great look like?	

Partnerships/Alliances

[The key partnerships or alliances to build that will accelerate growth in each major or minor.

Ideas include industry associations, complementary organizations, business partners, centers of influence, research organizations. The key is to determine the partnerships and alliances that are the best fit for your plan, and where you will commit to an investment – whether that is a financial investment, time investment, or both.]

	[Major / Minor]
1	
2	
3	

High – Level Marketing Plan

Your firm / company has a marketing strategy, but what is your personal strategy?

Key Area	Strategies / Tactics
Social Media	
Campaigns	
Webinars	
Events/Forums	
Thought Leadership Content	
Website Blogging & Guest Blogging	
Guest Podcasting	
Awards	