

Company Scoresheet (Example)

<i>Who</i>	<i>Measurables</i>	<i>Goal</i>	<i>21Apr</i>	<i>28Apr</i>	<i>05May</i>	<i>12May</i>	<i>19May</i>	<i>26May</i>	<i>02Jun</i>	<i>09Jun</i>
BD	Weekly cash in bank	£xxxx								
DA	% of post meeting de-briefs held	100%								
BD	No. of new client enquiries	3								
BD	No. of initial meetings held	2								
BD	No. of clients who pay planning fee	1.3								
BD	No. of clients implementing	1								
BD	New AUM secured (Forms lodged)	£250,000								
BD	New implementation fees received	£2,500								
DA	No. of articles sent to clients	0.5								
DA	No. of networking events attended	1								
DA	No. of professional connection F2F	1								

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Rock Sheet (Example)

<i>Who</i>	<i>Measurables</i>	<i>Goal</i>	<i>21Apr</i>	<i>28Apr</i>	<i>05May</i>	<i>12May</i>	<i>19May</i>	<i>26May</i>	<i>02Jun</i>	<i>09Jun</i>
BD	Investigate and prepare annual budget	On For 30 Jun								
MT	Commence e-newsletter process	On For 30 Jun								
BD	Hold weekly leadership meetings	1								
MT	Launch live website	On For 30 Jun								
DA	Progress marketing plan action points	On For 30 Jun								
DA	Generate £3M of new AUM in sales activity	On For 30 Jun								

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