

Yearly client goal planner

Created by Crystal Carter

DOMAIN: _____

Goals

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Goals

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MONTHLY CLIENT TASKS

- Report
- Check-in/Meeting
- Approvals
- Recommendations
- Other: _____

QUARTERLY GROWTH

CLIENT	Q1	Q2	Q3	Q4	YoY
	KPI				
	KPI				
	KPI				
	KPI				

YOUR GROWTH

- Increase client retention
- Learn new skill
- Join networking group
- Grow online following
- Write for a publication
- Other: _____