



Company Scorecard & Rocksheets

Company Scoresheet (Example)

Who	Measurables	Goal	21Apr	28Apr	05May	12May	19May	26May	02Jun	09Jun
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								

Rock Sheet (Example)

Who	Measurables	Goal	21Apr	28Apr	05May	12May	19May	26May	02Jun	09Jun
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								