ORANGE leaf CONSULTING
GOAL PLANNER FOR GROWTH

In the "Actual" columns:

1. Calculate the Average Fee per File for your office/agency and enter it in the box at the top.
2. Enter the number of opened and closed orders for the appropriate growth.
3. Divide the number of closed orders by the number of open orders to get a decimal percentage (e.g., 0.5 = 50%).
4. Multiply the average fee per file by the number of actual closed orders to estimate your revenue.

In the "Projected" columns:

1. Enter your revenue goal for the appropriate future month.
2. Divide the revenue goal amount by the average fee per file to find the number of closed orders you need.
3. Divide the number of projected closed orders by the historical close % to find out how many orders you need to open.

Office Goals

Annual Revenue Goal: _____   Average Fee per File: _____

Most Recent Year					**Actual**				**Projected**		
Month	# Open Orders	# Closed Orders	Monthly Close % (Closed/Open)	Monthly Revenue based on Avg Fee per file (Avg fee * #Closed)	# Open Orders	# Closed Orders	Monthly Close % (Closed/Open)	Monthly Revenue based on Avg Fee per file (Avg fee * #Closed)	Revenue Goal	# Closed to Reach Goal (Rev goal/ Avg fee)	#Open Based on Last Year's % (#closed/historical close %)
Jan											
Feb											
Mar											
Apr											
May											
Jun											
Jul											
Aug											
Sep											
Oct											
Nov											
Dec											
Totals											