



## Self-Evaluation

1. What are your greatest strengths in Real Estate?

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2. If you achieved your goals, what was the most important factor in helping you do so?

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3. If you failed to reach your goals, what prevented you from doing so (Be Specific)?

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4. What, if anything, do you need to do differently to reach next year's goals?

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5. What can your manager do to help you achieve your goals?

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6. What can the company do to help you achieve your goals?

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## Work Sheet for Agents Only

Name: \_\_\_\_\_

Mortgage (Total Housing expenses PITIA) \_\_\_\_\_

Car Payments \_\_\_\_\_

Car Insurance \_\_\_\_\_

Medical Insurance \_\_\_\_\_

Life insurance \_\_\_\_\_

Entertainment \_\_\_\_\_

Food \_\_\_\_\_

Gasoline \_\_\_\_\_

Savings \_\_\_\_\_

Business Expenses \_\_\_\_\_

Trips, Vacations \_\_\_\_\_

Income Taxes \_\_\_\_\_

Misc. Bills \_\_\_\_\_

Utilities \_\_\_\_\_

Other \_\_\_\_\_

Other \_\_\_\_\_

Other \_\_\_\_\_

Total Monthly Budget \_\_\_\_\_



Worksheet, do not turn in. This is to help you focus on how and where your business comes from.  
Agent Name:

When you decide what you want to achieve in the year ahead, it's good to have a clear idea of what you have accomplished in the last 12months. This is the starting point for setting realistic goals.

Business Plan

1. Budget Monthly and annualized costs
2. Math All the numbers, income, # units, #appointments, #contacts, average sales price/commissions
3. Objectives, Strategy, Tactic A list of the highest priority activities, Highest and best use of your time.
4. Daily and weekly schedule How to do it, when to do it, what to do.  
3 for your farm (prospecting plan, advertising plan, event plan)  
Open house plan, up desk plan, etc.  
Accountability and monitoring

2017 Results

Total Volume \_\_\_\_\_  
 Total Units Closed \_\_\_\_\_  
 Average Sales Price \_\_\_\_\_

2018 Target/Goals

Total Volume \_\_\_\_\_  
 Total Units Closed \_\_\_\_\_  
 Average Sales Price \_\_\_\_\_

2017 Source of Business

# Closed Listings Sold \_\_\_\_\_  
 # Closed Buyers Sides \_\_\_\_\_  
 # of internet Clients \_\_\_\_\_  
 # Closed from farm \_\_\_\_\_  
 # Sign Calls \_\_\_\_\_  
 # Closed from up desk \_\_\_\_\_  
 # Closed from Open House \_\_\_\_\_  
 # Closed 800#'s \_\_\_\_\_  
 # Closed Door knocking \_\_\_\_\_  
 # Closed FSBO \_\_\_\_\_  
 # Closed Expired's \_\_\_\_\_  
 # Closed Referrals \_\_\_\_\_  
 # Sphere of influence \_\_\_\_\_  
 # Closed past clients \_\_\_\_\_  
 # Closed other \_\_\_\_\_  
 # Closed other \_\_\_\_\_

2018 Source of Business

# Closed Listings Sold \_\_\_\_\_  
 # Closed Buyers Sides \_\_\_\_\_  
 # of internet Clients \_\_\_\_\_  
 # Closed from farm \_\_\_\_\_  
 # Sign Calls \_\_\_\_\_  
 # Closed from up desk \_\_\_\_\_  
 # Closed from Open House \_\_\_\_\_  
 # Closed 800#'s \_\_\_\_\_  
 # Closed Door knocking \_\_\_\_\_  
 # Closed FSBO \_\_\_\_\_  
 # Closed Expired's \_\_\_\_\_  
 # Closed Referrals \_\_\_\_\_  
 # Sphere of influence \_\_\_\_\_  
 # Closed past clients \_\_\_\_\_  
 # Closed other \_\_\_\_\_  
 # Closed other \_\_\_\_\_



## Production Worksheet

1. Budget Required for the Next 12 Months
2. Average Commission per closing
3. Number of closings required to Achieve Budget
4. Number of closed sales needed
5. Number of closed listings needed
6. % of Listings Taken that sell and close
7. % of sales that Close
8. # of Accepted Written Purchase Contracts Needed
9. Number of Listings Needed

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## Seller Sides

- A. Number of Appointments needed to obtain one Listing
- B. Number of Contacts needed to obtain one appointment
- C. Number of listing appointments needed Annually
- D. Number of listing appointments needed Monthly
- E. Number of listing appointments needed Weekly
- F. Number of contacts needed per week.

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## Buyers Sides

1. Number of appointments needed to obtain one sale
2. Number of contacts needed to obtain one appointment
3. Number of buyer appointments needed Annually
4. Number of buyer appointments needed Monthly
5. Number of buyer appointments needed Weekly
6. Number of buyer contacts needed per Week.

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List in Order of Priority i.e. Highest to Lowest  
Complete and return

**Strengths**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_

**Weaknesses**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_

Do you have a geographic farm?  
If so would you like an updated farming package?