



QUARTERLY BUSINESS PLAN

Name: _____ Coach: _____

Every ninety days, we have to take the time to accumulate, in-depth, and analyze, in-depth, what has happened in our business. The easiest way to do this is to take several hours, if necessary, and put all the appropriate numbers together so we can make logical decisions, instead of emotional decisions, regarding what we have to do next. As difficult as the following is, we need to accumulate these numbers so we can move forward with our business to the level of productivity that it should be, so we can assist you in creating the profit that you want and you deserve.

- 20 _____
1. Transaction goal for 20_____ is _____
 2. Listing goal for 20_____ is _____
 3. Total listing appointments first quarter _____
 4. Total listings taken first quarter _____
 5. Total listings sold first quarter _____
 6. Total buyer sales first quarter _____
 7. Total of #'s in 5 and 6 equals _____
 8. First quarter equals _____% of 20_____ goal _____
 9. Total closings in the first quarter _____
 10. Total income first quarter _____

11. What did I do exceptionally well in the first quarter?

12. How does the first quarter of this year compare to the first quarter of last year?

13. What did not do well in the first quarter?

14. What three or four things do I have to do in the second quarter to make sure I achieve the goal I've set?

15. The biggest thing that will stop me from achieving my second quarter goals is...

16. I prospected _____ hours per day in the first quarter for a total of _____ hours.

17. I made _____ contacts per day during the first quarter for a total of _____ contacts.

18. My contacts per hour equal 20 _____

19. My contacts per appointment equal _____

20. My contacts per listings taken equal _____

21. My contacts per listings sold equal _____

22. My contacts per closed deal equal _____

23. My total hours prospecting per listings taken equals _____

24. My total hours prospecting per closed deal equals _____

25. My prospecting income per hour based on deals closed equals _____

26. My listing appointment to listings taken ratio is _____

27. My total listings expired in the first quarter is _____

28. My total listings canceled in the first quarter is _____

29. Total price deductions taken during the first quarter _____

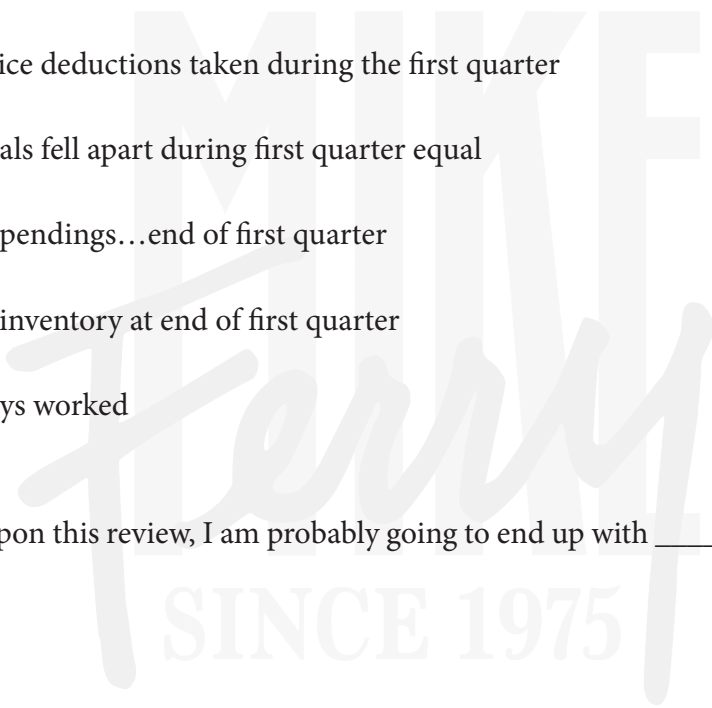
30. Total deals fell apart during first quarter equal _____

31. Present pendings...end of first quarter _____

32. Present inventory at end of first quarter _____

33. Total days worked _____

34. Based upon this review, I am probably going to end up with _____ deals closed for the year.



If this process is extremely difficult for you, it tells me several things:

- a. You probably don't know where your business is coming from or why you are getting it.
- b. You are probably buying a lot more business than you realize and/or are willing to admit.
- c. You are probably earning substantially less profit per transaction than you should be.
- d. You are probably becoming frustrated, and at times, even somewhat angry with both yourself and with me, because we keep trying to take you through this process.

20__ Quarter Plan

Month	Days Worked	Listing Appts.	Listings Taken	Listings Sold	Buyer Sales	Closings
Totals:						