



2018 LENDERS BUSINESS PLAN

Company: _____

2017 BUSINESS RECAP

Total Contacts: _____

Total Leads generated: _____

Total applications taken: _____

Total applications closed: _____

Total applications cancel: _____

Total days worked: _____

Total applications declined: _____

Total applications/REALTORS: _____

Total applications/PC: _____

Total applications/COI: _____

Total applications/Corp.: _____

Total applications/Listings/FSBO: _____

Total number of purchase: _____

Total number of refinance: _____

Income earned: _____

Business expenses: _____

Pipeline into 2017: _____

Average loan amount: _____

Average commission: _____



2017 RATIOS

Contacts per hour: _____
Hours prospected to lead: _____
Hours prospected to application: _____
Hours prospected to closed: _____
Dollars earned per hour prospecting: _____

2018 GOALS

Total contacts: _____
Total leads generated: _____
Total applications taken: _____
Total application closed: _____
Total applications cancel: _____
Total days worked: _____
Total applications declined: _____
Total applications/REALTORS: _____
Total applications/PC: _____
Total applications/COI: _____
Total applications/Corp.: _____
Total applications/Listings/FSBO: _____
Total number of purchase: _____
Total number of refinance: _____
Income earned: _____
Business expenses: _____
Pipeline into 2019: _____
Average loan amount: _____
Average commission: _____



1. THE THINGS I HAVE TO DO TO ACCOMPLISH MY GOALS:

Here we simply list as specifically as possible, those individual things that have to be done to achieve the goals you and your coach have set (Always include a date for accomplishment).

2. THE NUMBERS REQUIRED TO ACHIEVE THE 2018 GOAL:

Here we simply breakdown, starting with the number of closed deals and work backwards. So you want to take the number of closed deals, to the number of applications taken (add 20-25%), all the way to the number of contacts you need to make.
