

Customer Name : _____

QUARTERLY REVIEW

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? | |

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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 cancelled 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.

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

1. You probably don't know where your business is coming from or why you are getting it.
2. You are probably buying a lot more business than you realize and/or are willing to admit to.
3. You are probably earning substantially less profit per transaction than you should be.
4. 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.

_____ **Quarter Plan**

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