



1 VISION STATEMENT

I'M COMMITTED TO HAVE THIS YEAR BE MY BEST YEAR EVER BECAUSE...

PERSONAL VISION

PROFESSIONAL VISION

5 KEY AREAS TO **MASTER** PROFESSIONALLY 5 KEY AREAS TO **MASTER** PERSONALLY

1. _____
2. _____
3. _____
4. _____
5. _____

1. _____
2. _____
3. _____
4. _____
5. _____



2 TRANSACTION RESULTS / THIS YEAR'S GOALS

SOURCE	LAST YEAR'S TRANSACTIONS		THIS YEAR'S GOAL TRANSACTIONS		
	SELLERS	BUYERS	SELLERS	BUYERS	ENHANCEMENTS NECESSARY THIS YEAR?
C.O.I./Past Clients/Repeat					
C.O.I./Past Clients/Referrals					
Referrals from Agents					
Business/Professional					
Network					
Geographical Farming					
JL/JS/Yikes					
Mega Open Houses					
Zillow/Realtor/Trulia/Etc.					
My Website					
Print Ads					
Sign Calls					
Expires					
FSBOs					
Non-Owner Occupied					
NODs/Short Sales					
Relocation					
REOs					
Promotion/Seminars					
My Appointment Setter					
Other					
Other					
Other					
Other					
SUBTOTALS	0	0	0	0	
TOTALS	0		0		NOTE: TRANSFER ENHANCEMENTS NEEDED TO SYSTEMS AND MARKETING CALENDAR
	LAST YEAR		THIS YEAR		



3 NEW PROSPECTS CONVERSATION NEEDED

CONVERSATIONS CALCULATION			
ITEM	AMOUNT	DIRECTIONS	
1	THIS YEAR'S TRANSACTIONS GOAL	15	INPUT total transactions you want
2	TOTAL NEW PROSPECT CONVERSATIONS NEEDED (ANNUALLY)	600	MULTIPLY Line 1 by 40
3	TOTAL NEW PROSPECT CONVERSATIONS NEEDED (MONTHLY)	55	DIVIDE Line 2 by 11 (months)
4	TOTAL DAILY NEW PROSPECT CONVERSATIONS NEEDED	3	DIVIDE Line 3 by 20 (monthly working days)

THE NUMBERS		
	YOU	TEAM
Income Goal for This Year		
Number of Transactions Needed for Goals		
Number of Listings Taken		
Number of Listings Sold		
Number of Buyer Sales		



5 SYSTEM AND MONTHLY "DO" PLANS FOR GROWTH

JANUARY	FEBRUARY	MARCH

APRIL	MAY	JUNE

JULY	AUGUST	SEPTEMBER

OCTOBER	NOVEMBER	DECEMBER



7 DAILY ACTION CHECKLIST

ACTIVITIES	MON	TUE	WED	THR	FRI	SAT	SUN
DATES:							
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							
13.							
14.							
15.							
16.							
17.							
18.							
19.							
20.							
21.							
22.							



8 Business Expenses

ITEM	LAST YEAR'S EXPENSE		THIS YEAR'S EXPENSES	NOTES
	MONTHLY	ANNUALLY		
Dues (RE Board Dues/MLS Dues)				
Business Entertainment (Meals, Coffee, Cocktails, Events)				
Coaching				
Communication (Mobile Phone, Home Bus. Line, Internet)				
Education (Seminars, Books, CD's, etc.)				
Equipment & Supplies (Computers, Office Supplies, etc.)				
Accounting/CPA (Taxes)				
Marketing				
Print Advertising				
Online Advertising/Website				
Direct Mail				
Signs, Flyers, Brochures, Presentation Materials				
Promotional (Gifts, Event Tickets, Sponsorships, etc.)				
Marketing Consulting				
Other Marketing				
Other Marketing				
Misc. Sales Cost (Agent Paid Inspections, Repairs, Goodwill, Staging, etc.)				
Outside Services (Consulting, Book Keeping, etc.)				
Transaction Coordination				
Travel Expense (Airfare, Lodging, Ground Transportation, Incidentals)				
IRA Contribution				
Wages (Assistant, Employees)				
Other				
Other				
Other				
Other				
TOTAL BUSINESS EXPENSES	\$0	\$0	\$0	



9 Personal Expenses

ITEM	LAST YEAR'S EXPENSE	THIS YEAR'S EXPENSES	NOTES
Auto Gas			
Auto Insurance			
Auto Maintenance			
Auto Payments (Lease/Loan)			
Auto Purchase			
Auto Registration			
CATV/Satellite TV			
Cell Phone			
Charitable Contribution			
Childcare			
Clothing			
Club Membership			
Entertainment			
Food & Groceries			
General Household Items			
Gym, Health & Beauty			
Home & Yard Maintenance			
Homeowners Insurance			
Household Utilities			
Life Insurance			
Medical/Dental Expense			
Mortgages/Rent			
Personal Savings			
Property Taxes			
School Tuition K-12			
Vacation			
Retirement Savings			
College Funds			
Other			
Other			
Other			
Other			
Other			
TOTAL PERSONAL EXPENSES	\$0	\$0	