

MOMENTUMSM

AGENT BUSINESS PLAN

THE PURPOSE OF THE Momentum+SM PROGRAM

As a REMAX® agent, you’re a member of the most professional, most productive real estate network in the world.

There are many decisions you must make each day to run a successful business. The Momentum+ program provides basic information to help you. Please note: The Momentum+ program and materials are designed as a resource to reference. The suggestions made within are not mandatory.

FOR ILLUSTRATION ONLY

Certain sections of the Momentum+ materials illustrate how making changes to numbers, such as for costs and expenses, can financially impact an agent’s business. These sections are meant to be illustrations only and are not intended to be an exhaustive list of costs that may impact your business or to be specific to your situation. RE/MAX, LLC makes no promises, representations or guarantees of any kind about the success or profitability of your operations.

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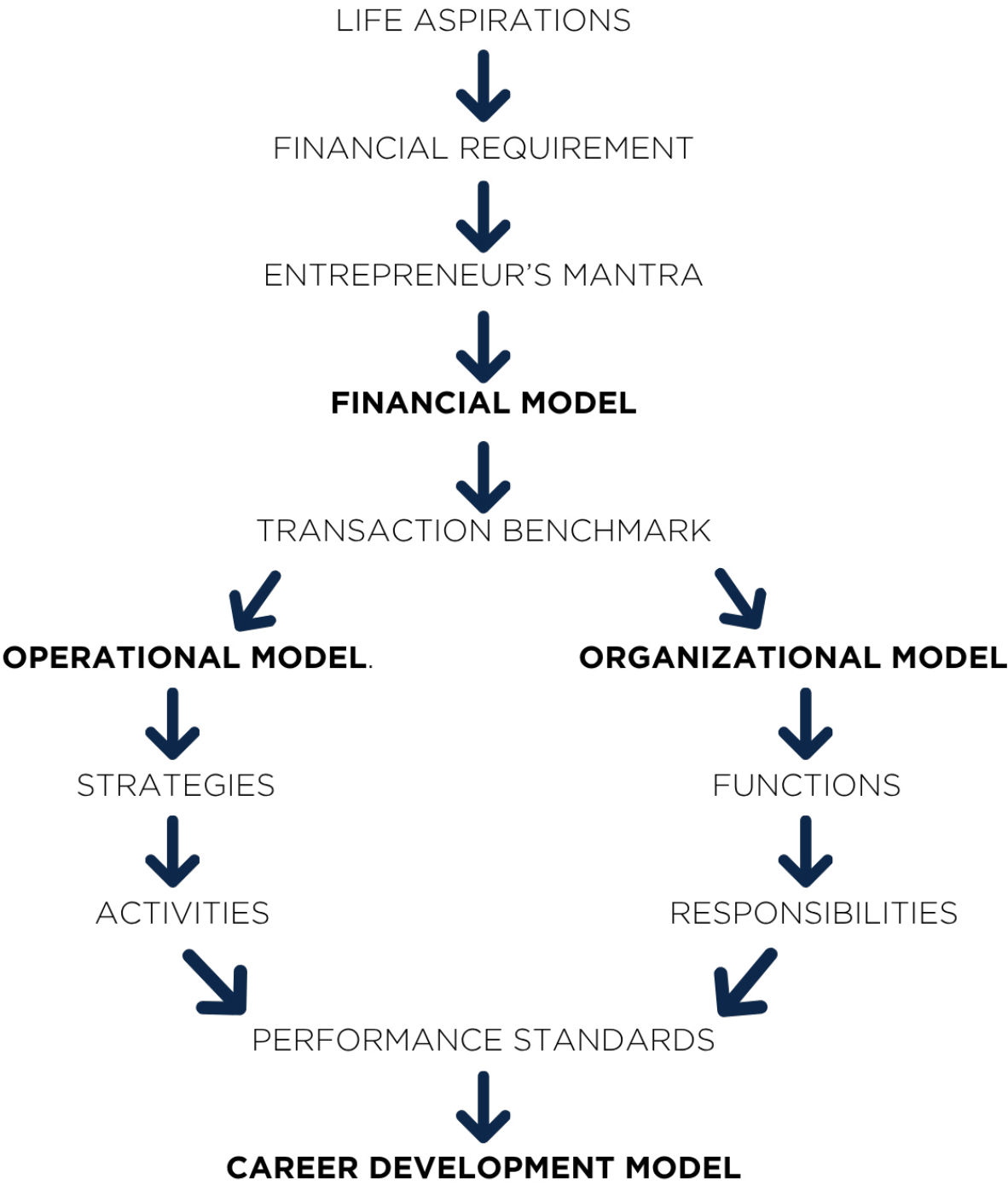
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When cold calling, be aware of the requirements of the national (and, if applicable, state) Do Not Call Registry before placing calls. Additionally, be aware of federal and state laws regarding calling consumers before 8 a.m. or after 9 p.m.

Think of it this way—



The Momentum+ Business Plan provides a 13-step, systematized approach to help you run your business. The plan will help you establish a financial goal for your business that consists of expenses and aspirations. You will also help you identify the vital activities to focus on in order to achieve the financial goal.

The Momentum+ Business Plan will walk you through 13-steps that will clarify your Financial Model, Operational Model, Organizational Model and Career Development Model.

STEP 1	Determine monthly personal and business expenses
STEP 2	Determine annual expenses
STEP 3	Define aspirations
STEP 4	Calculate required net revenue
STEP 5	Determine taxable income
STEP 6	Determine transaction benchmark
STEP 7	Establish lead dispersal
STEP 8	Transaction sources
STEP 9	Calculate performance standards
STEP 10	Vital activities checklist
STEP 11	Determine who is doing what
STEP 12	Identify relevant courses
STEP 13	Accountability

STEP 1:
Determine your monthly personal and business expenses.

PERSONAL EXPENSE TYPE	MONTHLY AMOUNT
Mortgage/Rent	\$
Car Payment	\$
Car Fuel	\$
Car Maintenance	\$
Car Insurance	\$
Electric	\$
Gas	\$
Cable	\$
Internet	\$
Phone	\$
Water	\$
Food	\$
Entertainment	\$
Travel	\$
Child Care	\$
Savings	\$
Health Insurance	\$
Cell Phone	\$
Credit Cards	\$
Retirement	\$
Miscellaneous	\$
Other	\$
Other	\$
Total Monthly Personal Expenses	\$ 0.00

RESOURCE: An expanded personal budget can be found in the Appendix on pages 35-37.

BUSINESS EXPENSE TYPE	MONTHLY AMOUNT
Auto	\$
Travel/Entertainment	\$
Network (Sphere) Marketing	\$
Non-Network (Non-Sphere) Marketing	\$
Property Specific Marketing	\$
Administrative	\$
Team	\$
Other	\$
Other	\$
Total Monthly Business Expenses	\$ 0.00

RESOURCE: An expanded business budget can be found in the Appendix on page 38.

STEP 2:
Determine total annual expenses.

BUSINESS EXPENSE TYPE	MONTHLY AMOUNT
Total Monthly Personal Expenses	\$
Total Monthly Business Expenses	\$
Total Monthly Expenses	\$ 0.00
	X
Total Annual Personal and Business Expenses	\$

STEP 3:
Define aspirations.

Aside from annual business expenses and personal expenses, you must determine what else you are passionate about funding and what your aspirations are.

In addition to the money needed to cover your total annual expenses, you'll likely want to earn more to allow for vacations, early retirement, college funds for your children, a new home, etc.

For each category that applies, prioritize what gets funded first, second, third, etc. After prioritizing, put an annual number next to each applicable category indicating how much money it would take to annually fund that aspiration.

CATEGORY OF ASPIRATION	PRIORITY	ANNUAL AMOUNT
Savings Accounts		\$
Standard Retirement		\$
College Fund		\$
Early Retirement		\$
General Investments		\$
Vacation/Travel		\$
Hobbies		\$
New Car		\$
Second Home		\$
Charity/Endowments		\$
Other		\$
Other		\$
Total Annual Aspirations Budget		\$ 0.00

STEP 4:
Calculate required net revenue.

TARGET TAKE-HOME	
Total Annual Expenses	\$
Total Annual Aspirations	\$
Required Net Revenue	\$ 0.00

Success Statement
It is unacceptable for my business to profit less than \$

STEP 5:
Calculate taxable income.

Everything you have worked on so far is your target take-home income (required profit). Now, you need to figure out your taxable income. This is the amount of money you will need to actually make this year, in your business, in order to reach your Target Take-Home goal after income taxes are withdrawn.

EXAMPLE: Your target take-home income (required profit) is \$100,000 and you estimate your tax rate to be 30%.

TAX LIABILITY EXAMPLE		
Assumed Tax Rate 30%	÷ 100	= .30
1 -	.30	= .70
Required Net Revenue	÷ .70	Targeted GCI = \$142,857

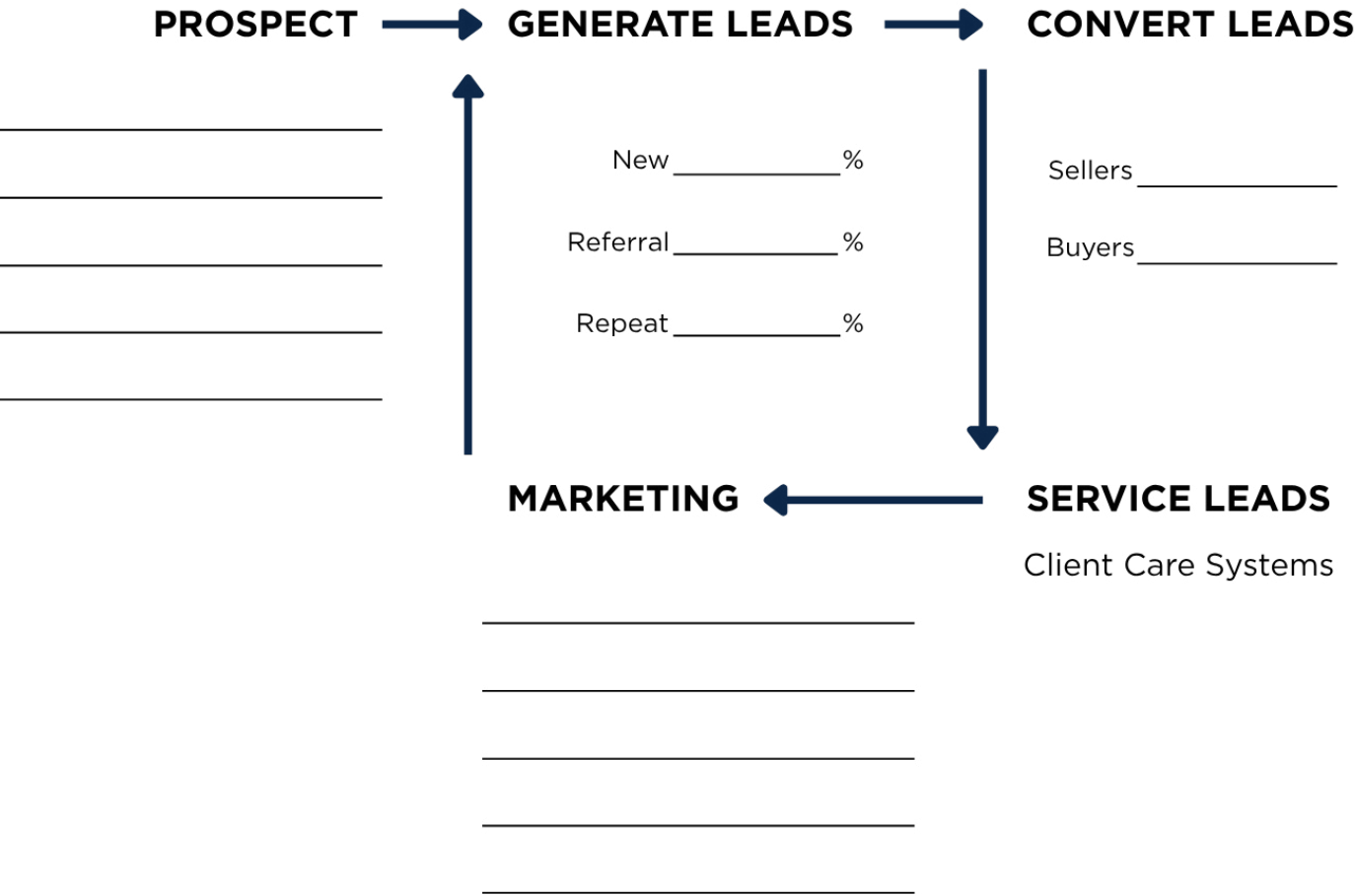
What does this mean? At a 30% tax rate, you would have to make \$142,857 in order to bring home \$100,000.

Targeted GCI = \$142,857

***Disclaimer:** These multipliers are used for example purposes only.
You must adjust for your own federal and state taxes.

Your Turn!

TAX LIABILITY EXAMPLE		
Assumed Tax Rate _____ %	÷ 100	=
1 -		= 1.00
Taxable Income	÷	Success Statement =



Step 6:
Calculate your transaction benchmark.

Example:

TRANSACTION BENCHMARK		
Targeted GCI \$142,857	Average Commission ÷ .015	Target Sales Volume = \$9,523,800
Target Sales Volume \$9,523,800	Average Sales Price ÷ \$500,000	Transaction Benchmark = 19.05

Your Turn!

TRANSACTION BENCHMARK		
Targeted GCI \$ _____	Average Commission ÷ _____	Target Sales Volume = \$ _____
Target Sales Volume \$ _____	Average Sales Price ÷ \$ _____	Transaction Benchmark = _____

RESOURCE: An expanded commission structure tool can be found in the Appendix on page 39.

Step 7:
Establish lead dispersal.

Establish quantity of leads and which side of your business these transactions will be closed from.

Example:

TRANSACTION BENCHMARK		
Percent Sellers .60	Transactions Required X 19	Closed = 11.4
Percent Buyers .40	Transactions Required X 19	Closed = 7.6

Your turn!

TRANSACTION BENCHMARK		
Percent Sellers _____	Transactions Required X _____	Closed = _____
Percent Buyers _____	Transactions Required X _____	Closed = _____

Step 8:
Transaction Sources.

Compare your transaction amounts from the last 12 months and identify where additional transactions will be generated from for the next 12 months.

Transaction Benchmark (Buyers)

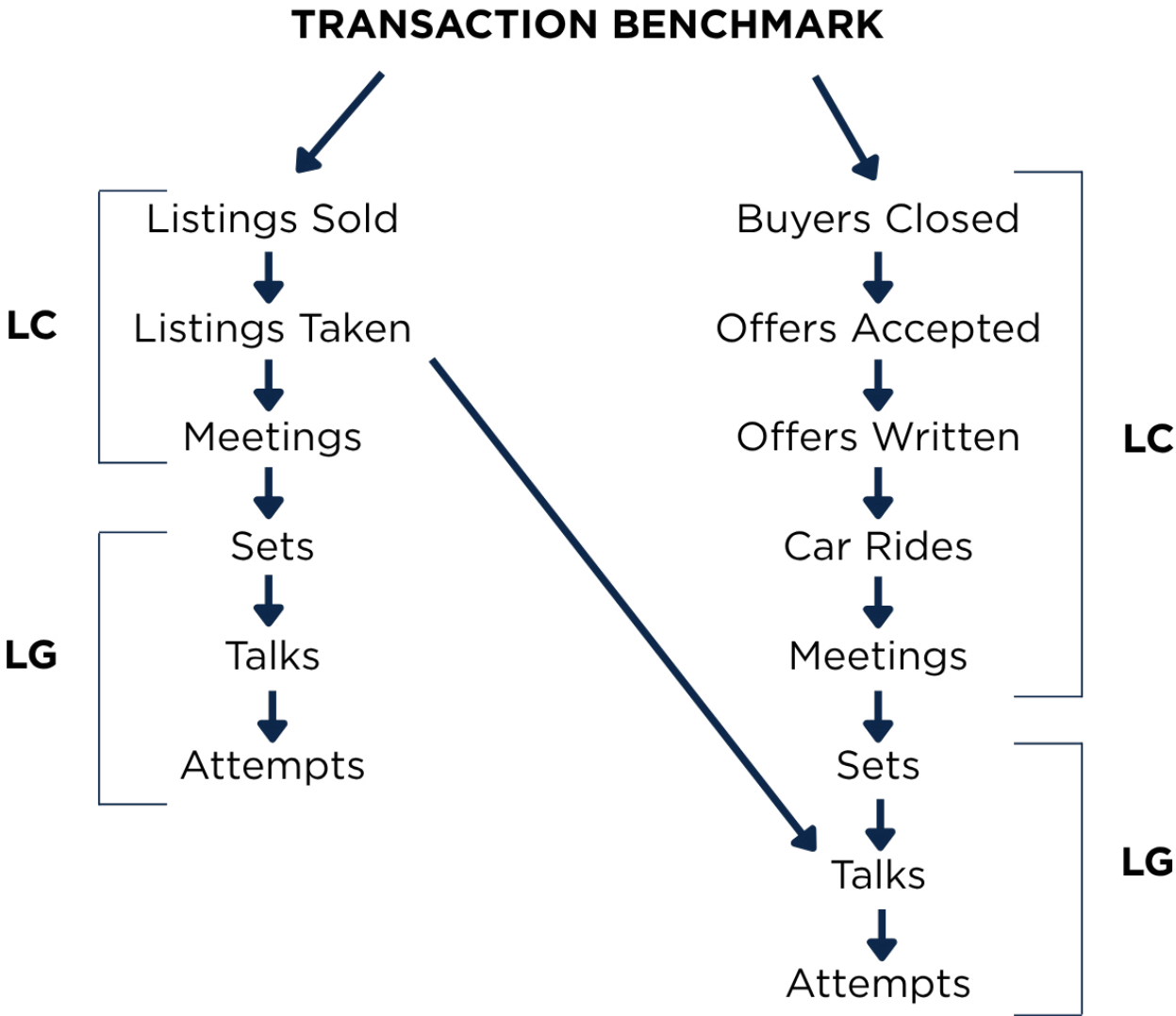
Transaction Benchmark (Sellers)

Transaction Source	Listings Sold		Buyers Sold	
	Prior Year	Next Year	Prior Year	Next Year
Network				
FSBO				
Expired				
Open House				
Farming				
Sign Calls				
Ad Calls				
Just Listed				
Just Sold				
Internet/Websites				
Total Transactions				

Step 9:

Track conversion rates and establish performance standards.

Tracking your efforts is a crucial element to help you understand where you can become more effective and efficient in your business. If you have never tracked your own performance standards and conversion rates, the examples below can help you get started. An expanded conversion rate tracking sheet can also be found in the Appendix on page 40.



PERFORMANCE STANDARDS

LISTING DEPARTMENT:

- Dials per talk
- Talks per set
- Sets per meeting
- Meetings per listing
- Sales percentage
- Buyer calls per listing taken

BUYER DEPARTMENT:

- Dials per talk
- Talks per set
- Sets per meeting
- Meetings per car ride
- Car Rides per offer written
- Written per accepted offer
- Accepted per closed offer

Listing Conversion Rates

LISTING DEPARTMENT	Network	Expired	FSBO	Farming	Just Sold
Listings Sold ^A					
Sales Percentage ^B					
Conversion Rate ^C					
Show-Up Rate ^D					
Set Rate ^E					
Talk Rate ^F					

^AAnticipated number of listings you will sell from source (from Operational Model)
^BPercentage of listings that sell from source
^CPercentage of time you get the listing from source
^DPercentage of time prospect from source does not cancel the listing meeting
^EPercentage of time you set an appointment when talking to someone from source
^FPercentage of time you talk to a prospect when making a proactive attempt from source

Listing Performance Standards

	Network	Expired	FSBO	Farming	Just Sold
Taken ^G					
Meetings ^H					
Sets ^I					
Talks ^J					
Attempts ^K	Dials	Dials	Knocks	Members	Combined

^GA ÷ B
^HA ÷ B ÷ C
^IA ÷ B ÷ C ÷ D
^JA ÷ B ÷ C ÷ D ÷ E
^KA ÷ B ÷ C ÷ D ÷ E ÷ F

Buyer Conversion Rates

BUYER DEPARTMENT	Network	Open House	Farm	Property Calls	Just Listed	Web Sites
Buyers Closed ^A						
Closed Percentage ^B						
Acceptance Rate ^C						
Written Rate ^D						
Car Ride Rate ^E						
Show-Up Rate ^F						
Set Rate ^G						
Talks Rate ^H				N/A		N/A

^AAnticipated number of buyers you will close from source (see Operational Model)
^BPercentage of accepted offers that close from source
^CPercentage of written offers that get accepted from source
^DPercentage of buyers you show homes to who write an offer from source
^EPercentage of prospects you meet with who get into your car from source
^FPercentage of time prospect from source does not cancel the listing meeting
^GPercentage of time you set an appointment when talking to someone from source
^HPercentage of time you talk to a prospect when making a proactive attempt from source

Buyer Performance Standards

	Network	Open House	Farm	Property Calls	Just Listed	Web Sites	Total
Accepted ^I							
Written ^J							
Car Rides ^K							
Meetings ^L							
Sets ^M							
Talks ^N							
Attempts ^O	Dials	Visitors	Members	N/A	Combined	N/A	

^IA÷B
^JA÷B÷C
^KA÷B÷C÷D
^LA÷B÷C÷D÷E
^MA÷B÷C÷D÷E÷F
^NA÷B÷C÷D÷E÷F÷G
^OA÷B÷C÷D÷E÷F÷G÷H

Step 10: Vital Responsibilities and Vital Activities Checklist

14 Vital Agent Responsibilities

7 Vital Listing Agent Responsibilities

- 1. Lead Generation (Finding)
- 2. Lead Conversion (Attracting)
- 3. Administrative Preparation
- 4. Marketing and Exposure
- 5. Presenting and Negotiating
- 6. Closing Preparation
- 7. Post-Closing Activities

7 Vital Buyer’s Agent Responsibilities

- 1. Lead Generation (Finding)
- 2. Lead Conversion (Attracting)
- 3. Administrative Preparation
- 4. Showing
- 5. Writing and Negotiating
- 6. Closing Preparation
- 7. Post-Closing Activities

LEAD GENERATION

- 1. Finding Sellers (face to face, phone calls, mail, email)
 - a. FSBOs
 - b. Expired and terminated listings
 - c. Traditional and social networks
 - d. Just-sold notifications
 - e. Farming

LEAD CONVERSION

- 2. Ask pre-listing questions
- 3. Assemble pricing tools
- 4. Confirm appointment
- 5. Prepare listing agreement
- 6. Get on the listing agreement
- 7. Arrive on time
- 8. Have the listing conversation
 - a. Set tone
 - b. Uncover needs
 - c. Prioritize needs
 - d. Transition to pricing tools
 - e. Review pricing information
 - f. Agree on appropriate price entry point
 - g. Transition roles and expectations
 - Review my role
 - Review your role
 - h. Agree on roles and expectations
 - i. Close in on listing agreement
 - j. Explain listing agreement
 - k. Review staging plan
- 9. Sign listing agreement

ADMINISTRATIVE PREPARATION

- 10. Measure rooms and complete MLS input sheet
- 11. Take interior/exterior pictures
- 12. Place sign and lock box
- 13. Mail thank you letter
- 14. Create listing file
- 15. Contact showing service
- 16. Deliver listing agreement, MLS sheet and notices to office
- 17. Place client in database management/touch program
- 18. Obtain loan payoff

MARKETING AND EXPOSURE

- 19. Place in MLS and other websites
- 20. Look up just-listed phone numbers and addresses
- 21. Order just-listed cards
- 22. Request or create home flyers
- 23. Door knock 25 closest neighbors
- 24. Call 50 neighbors
- 25. Mail 200 just-listed cards
- 26. Email home flyer to area agents
- 27. Solicit feedback from showing agents
- 28. Prepare weekly update sheet
- 29. Call seller with weekly updates

PRESENTING AND NEGOTIATING

- 30. Proactively solicit multiple offers
- 31. Present offers/counteroffers
- 32. Deliver accepted contract to office
- 33. Negotiate repairs
- 34. Copy repair invoices

CLOSING PREPARATION

- 36. Schedule closing
- 37. Communicate with seller
- 38. Communicate with selling agent
- 39. Review title commitment
- 40. Review HUD statement
- 41. Attend closing

POST-CLOSING ACTIVITIES

- 42. Mail customer survey
- 43. Change status in MLS and remove from website
- 44. Order just-sold cards
- 45. Door knock 50 closest neighbors
- 46. Call 100 neighbors
- 47. Mail 300 just-sold cards

LEAD GENERATION

- 1. Finding Buyers (face to face, phone calls, mail, email)
 - a. Network and Farming
 - b. Open houses
 - c. Yard signs and home ads
 - d. Internet (websites, Craigslist, social marketing)
 - e. Just listed

LEAD CONVERSION

- 2. Meeting in office (meeting #1)
- 3. Move into conference room
- 4. Get on the selling channel
- 5. Have buyer conversation
 - a. Build rapport
 - b. Set the tone
 - c. Uncover needs and wants
 - d. Prioritize wants
 - e. Verify motivation
 - f. Check financial ability
 - g. Transition to roles and expectations
 - Review my role
 - Review your role
 - h. Agree on roles and expectations
 - i. Close in on a working agreement
 - Review Buyer Representation Agreement
 - Give buyers guide and contract
 - Set date for a second meeting
- 6. Sign Buyer Representation Agreement

ADMINISTRATIVE PREPARATION

- 7. Mail thank you letter
- 8. Create buyer file
- 9. Verify price range with lender
- 10. Verify price range with buyer
- 11. Place client in database management/Touch Program
- 12. Search MLS and FSBO inventories
- 13. Call listing agent to verify availability
- 14. Prepare showing packages
- 15. Book showings

SHOWING

- 16. Meet in the office (meeting #2)
- 17. Review buyer needs
- 18. Explain showing packages
- 19. Answer questions
- 20. Get in the car
- 21. Tour homes
- 22. Finalize an offer

WRITING AND NEGOTIATING

- 23. Send offer to listing agent
- 24. Negotiate offer to acceptance
- 25. Open title/deliver earnest money
- 26. Deliver signed contract to office
- 27. Schedule home inspections
- 28. Check home insurability
- 29. Communicate with buyer
- 30. Communicate with listing agent
- 31. Review inspection report with buyer
- 32. Send amended contract to listing agent
- 33. Negotiate repairs

CLOSING PREPARATION

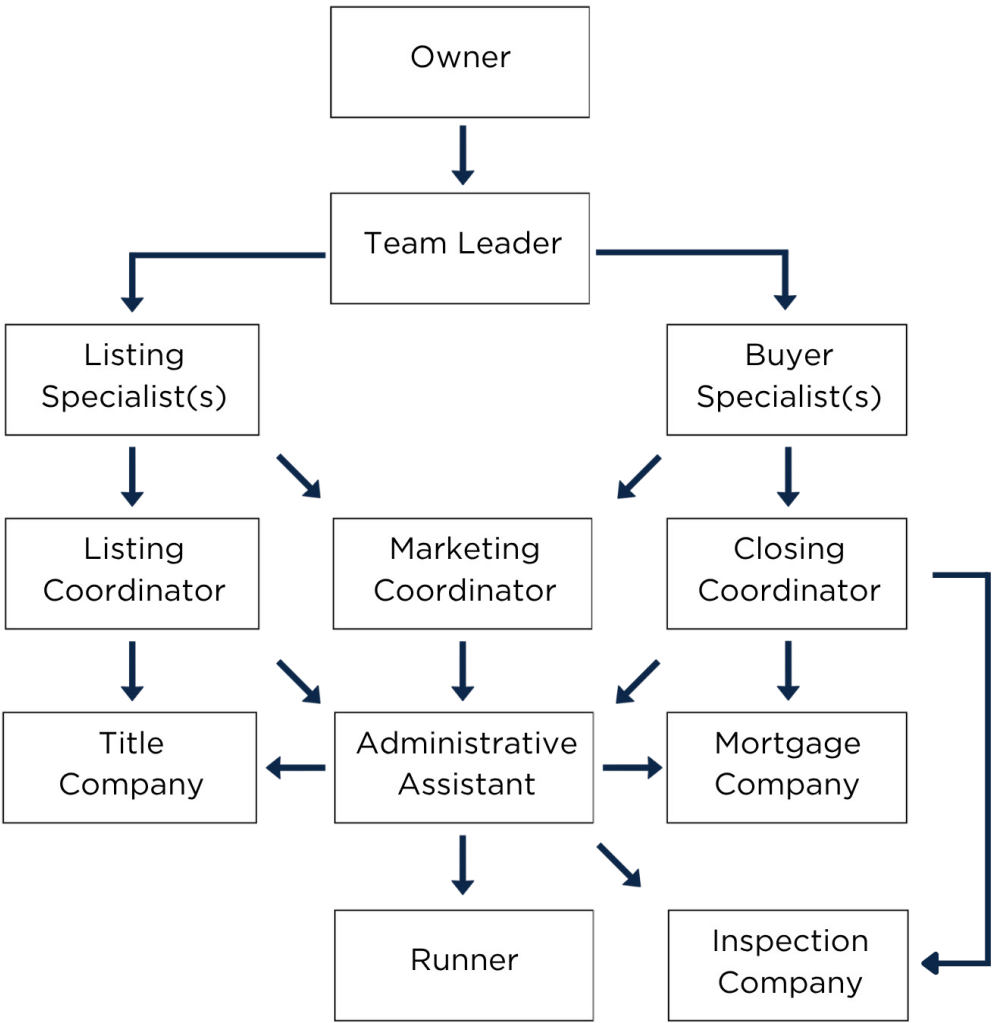
- 34. Schedule closing
- 35. Communicate with buyer
- 36. Communicate with lender
- 37. Review title policy
- 38. Review HUD statement
- 39. Attend closing

POST-CLOSING ACTIVITIES

- 40. Mail customer survey
- 41. Look up just sold phone numbers and addresses
- 42. Order just-sold cards
- 43. Door knock 50 closest neighbors
- 44. Call 100 neighbors
- 45. Mail 300 just-sold cards
- 46. Make 7-day follow-up call to buyer
- 47. Make 30-day follow-up call to buyer

Step 11: Determine who is doing what.

Now that you have clarified your financial and operational models, you should have a clear understanding of your Operational Responsibilities and Vital Activities. The next step in the business plan is to identify what your Organizational Model will look like.



What positions are currently filled?

What positions are currently not filled?

Step 12: Identify relevant courses.

Identify the relevant courses you will need to take to enhance your skill set and meet your transaction benchmark as well as any of the recommended agent development programs.

Recommended Agent Development Programs

Lecture Study Practice Reinforcement Accountability Mastermind

THE 18 CORE TRAINING COURSES

LEAD GENERATION CLASSES:	CHECK RELEVANT COURSES
Expired Boot Camp	
FSBO Boot Camp	
Open House Boot Camp	
Marketing Boot Camp	
Referral Boot Camp	
Power of Video Boot Camp	
Social Media Boot Camp	
Phone Prospecting Boot Camp	
LEAD CONVERSION CLASSES:	
Listing Conversion	
Listing Objections Boot Camp	
Pricing Boot Camp	
Buyer Conversion	
BUSINESS CLASSES:	
Real Estate Sales Perspective	
The Leverage Summit	
Activities Management	
Master Team Builder	
The Emotionally Intelligent Agent	
Negotiation Boot Camp	

Proactive lead generation allows for complete control of financial destiny!

Expired Boot Camp

Teaches the Call-to-Close method, which is a very direct and proactive approach to working expired listings over the phone. Dialogue is taught in a progressive manner, giving each Associate an opportunity to become comfortable and confident with the technique. Agents will learn how to add from 1 to 3 listings per week to their inventory. Plans, scripts and tools are provided. (All Phases)

FSBO Boot Camp

Teaches the Five-Step-Follow-Up method, a complete, non-threatening approach to effectively working For Sale by Owners. Agents will learn how to proactively solicit, follow up with and close FSBOs in a way that adds value to all. Plans, scripts, tools and follow-up materials are provided. (All Phases)

Open-House Boot Camp

Teaches the Label-the-Looker method, a complete, non-threatening approach to conversing and following up with open-house attendees. Agents will learn how to advertise and hold highly effective and productive open houses. In-home and followup scripts will be discussed thoroughly. Plans, scripts and tools are provided. (All Phases)

Marketing Boot Camp

Teaches the Who-Do-You-Know method, a very simple and proactive approach to working neighbors who live around just-listed and just-sold properties. The course also covers the Label-the-Caller method, a focused and effective approach to answering yard sign and ad calls. As a bonus, this course also teaches the SmartFarm method, a proven, effective approach for choosing and servicing fruitful farm areas. Plans, scripts and tools are provided. (All Phases)

Referral Boot Camp

Teaches a unique 33-Touch program, which helps agents increase their referral based business. Agents learn how to proactively stay in flow with friends, family and past clients through mailings, phone calls and social media. Plans, scripts and mailers are provided. (All Phases)

Power of Video Boot Camp

The Power of Video teaches you how to build a complete video system, through personal branding and dollar-productive activities. You'll learn how to identify your personal brand, as well as how to deliver value-driven content to your ideal audience, through storytelling. This class will provide basic concepts and tools, designed to establish confidence and ability, around video messaging. As an end result, you will then be able to leverage video within your vital activities. Tools you will need to create a beginner video system are provided within this course. (All Levels)

Social Media Boot Camp

Social Media Boot Camp teaches an intentional and proactive approach to utilize social media platforms. Agents will learn how to identify their target audience and how to implement social media strategies to grow their business. The end result of this class is an associate will be able to create additional client relationships and nurture existing relationships through the utilization of social media strategies. (All Levels)

Phone Prospecting Boot Camp

Teaches the keys to successful phone prospecting, beginning with the importance of thoughts and mindset. The course covers the purpose of the call, who to call and what to say while on the call. Learn best practices to become proficient at lead generation via phone prospecting. Take it to another level by incorporating the advanced phone prospecting skills covered in this course. (All Levels)

It doesn't do any good to go bat if you don't knock it out of the park!

Basic Listing Conversion

Teaches a proven, professional listing conversation. The five stages of an effective listing conversation are covered in detail. Attendees will be exposed to professional scripts and tools designed to set them apart from their competition. Plans, scripts and tools are provided. (Phase 1)

Listing Objections Boot Camp

Teaches a non-confrontational approach to overcoming common seller objections. Agents learn how to respond with confidence and without hesitation to the most common seller questions, objections and concerns. Plans and scripts are provided. (All Phases)

Pricing Boot Camp

Teaches the unique Seven-Step Pricing Strategy™. After attending this class, agents will feel confident in their ability to help sellers arrive at the most appropriate entry-point price while at the same time adding greatly to their value proposition as a listing consultant. Plans, scripts and tools are provided. (All Phases)

Buyer Conversion

Teaches agents the five stages of effectively working with buyers. Agents learn a complete “Buyers Process,” which covers how to facilitate a buyer conversation, identify appropriate properties, prepare showing packages, show homes, overcome common buyer hesitations and close the sale. This class is designed to turn a typical agent into a highly respected and sought-after buyer’s consultant. Plans, scripts and tools are provided. (All Phases)

Agents should be treated as president and CEOs of their own business!

Real Estate Sales Perspective

Provides an overview of the real estate sales business. Agents learn the three irrefutable facts of real estate and the unique entrepreneurial approach. After attending the class, agents will have a realistic picture of what it takes both mentally and behaviorally to build a successful real estate business. Plans, models and tools are provided. (All Phases)

Leverage Summit

Teaches experienced agents how to leverage themselves through team building. Agents receive complete job descriptions, interview forms, interview questions, behavioral assessments and performance expectations for the purpose of hiring personal assistants, closing coordinators, listing coordinators, marketing coordinators, runners, buyer’s specialists, listing specialists and team leaders. After this class, agents will have a complete and proven system for finding, attracting and hiring the talent needed for a highly proficient sales business. (Late Phase 2; Phase 3)

Activities Management

Provides an overview of the career-changing Activities Management System (A.M.S.) along with an introduction to the three phases of a successful business. Agents are challenged to discard the time-management myth and embrace the use of vital time blocks. After attending the class, agents will understand the differences between vital, dollar-productive and highest-and-best-use activities. This class is a must for any Associate desiring to become more effective and efficient.

Master Team Builder

Provides direction for establishing a team built for success. Agents learn to develop a core team ideology, create a mission, and establish values, beliefs and expectations. The subject matter covers different team organizational models and defines the various roles and job descriptions of team members. This class is designed specifically for anyone wanting to start a team or take their existing team to the next level of production.

The Emotionally Intelligent Agent

Teaches how to understand, manage and use emotional intelligence throughout a real estate transaction to provide the best experience for clients from start to close. Beginning with understanding what emotional intelligence is’ the course then dives into self-awareness, self-regulation and client implementation to begin building an emotional intelligence sales strategy to implement in your business.

Negotiation Boot Camp

Teaches a foundational framework for approaching any negotiation. The course covers a format for structuring your approach to navigating buyer and seller positions to tactics to be aware of when in the middle of a negotiation. Agents will learn how to become more intentional and proactive in their approach to maximizing value for their clients. (All Levels).

Step 13: Accountability.

Identify the relevant courses you will need to take to enhance your skill set and meet your transaction benchmark as well as any of the recommended agent development programs.

Accountability is designed to help you remain focused and disciplined in order to realize your aspirations. Think of ongoing accountability as a coaching session from your office! Tracking your efforts and results is critical to seeking your next level!

Accountability is typically administered in a group setting based on three levels that your business goes through as it grows. The three levels are:

Level 1: Agents wishing to improve their commitment, confidence and consistency to generate cash flow.

Level 2: Agents wishing to improve their endurance, effectiveness, efficiency and maximize cash flow and the level of expertise.

Level 3: Agents wish to improve their patience and proficiency in order to maximize profits and minimize time in their business.

What type of accountability do you require to achieve your goals? Below, on a scale of 1-3, indicate which level you see yourself at (a 1 indicates that you need more accountability; a 3 means you need little accountability).

Level: _____

Level Group Meeting Day and Time: _____

LEVEL 1 (**TOOL**)

EXPIRED		FSBOs		OPEN HOUSES	
ATTEMPTS		FIRST VISITS		NUMBER HELD	
SPOKEN WITH		FOLLOW UPS		UNITS THROUGH	
PRESENTATIONS SET		PRESENTATIONS SET		PRESENTATIONS SET	
PRESENTATIONS GIVEN		PRESENTATIONS GIVEN		PRESENTATIONS GIVEN	
TRANSACTIONS (S or B)		TRANSACTIONS (S or B)		TRANSACTIONS (S or B)	

NETWORK/SPHERE		FARM AREA		JUST LISTED/SOLD	
ATTEMPTS		ATTEMPTS		ATTEMPTS	
SPOKEN WITH		SPOKEN WITH		SPOKEN WITH	
PRESENTATIONS SET		PRESENTATIONS SET		PRESENTATIONS SET	
PRESENTATIONS GIVEN		PRESENTATIONS GIVEN		PRESENTATIONS GIVEN	
TRANSACTIONS (S or B)		TRANSACTIONS (S or B)		TRANSACTIONS (S or B)	

HOME ADS/SIGN CALLS		INTERNET/SOCIAL MEDIA	
ATTEMPTS		ATTEMPTS	
SPOKEN WITH		SPOKEN WITH	
PRESENTATIONS SET		PRESENTATIONS SET	
PRESENTATIONS GIVEN		PRESENTATIONS GIVEN	
TRANSACTIONS (S or B)		TRANSACTIONS (S or B)	

LEVEL 1 (**TOOL**)

Week of: _____ How many hours am I expecting I will work? _____

This week, my expectations are to complete:

Activities	Amount I am expecting to complete this week
Listings taken:	
Offers written:	
Listing conversations had:	
Buyer conversations had:	
FSBOs visited:	
Expired listings called:	
Open houses held:	
People in my network called:	
People around J/L and J/S called:	
People in my farm area called:	

My actual week. How many hours I actually worked: _____

Activities	Actual	Activities	Actual
Listings taken:		Talks had:	
Offers written:		Sets:	
Listing conversations had:		• Listing	
Buyer conversations had:		• Buyer	
FSBOs visited:		Listings in my inventory:	
Expired listings called:		“A” Buyers:	
Open houses held:		Executed contracts (expected to close in the next 30 days):	
People in my network called:		Other	
People around J/L and J/S called:		Other	
People in my farm area called:			

How would you sum up your week? Would it be: “I’m glad I did it!” or “I wish I had.”

Level 2 and 3 (*TOOL*)

Name: _____ Week: _____

HOURS:

Training and Development	_____
Lead Generation	_____
Lead Conversion	_____
Servicing	_____
TOTAL	0

	BUYERS	LISTINGS
Total Attempts	_____	_____
Total Talks	_____	_____
Total Set	_____	_____
Total Given	_____	_____
Total Transactions	_____	_____
Total Listings in Inventory	_____	
Total “A” Buyers in Inventory	_____	
Total in 8-in-8 Program	_____	
Total 16-Touch Program	_____	
Transactions from 8-in-8	_____	
Transactions from 16-Touch	_____	

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APPENDIX

Personal Expense Budget Sheet

HOME EXPENSES	PRIORITY	YOUR ACTUAL
Mortgage/Rent		\$
Utilities (Gas, Electric, Garbage, Internet, Cell)		\$
Home Maintenance and Repairs		\$
Yard Care		\$
Home Security		\$
Property Taxes (if not in mortgage)		\$
Homeowners/Renters Insurance		\$
Other		\$
Other		\$
Total Home Expenses		\$ 0.00

DAILY LIVING EXPENSES	PRIORITY	YOUR ACTUAL
Groceries		\$
Childcare		\$
Dry Cleaning		\$
House Cleaning Service		\$
Other		\$
Other		\$
Total Daily Living Expenses		\$ 0.00

Personal Expense Budget Sheet (cont.)

TRANSPORTATION	PRIORITY	YOUR ACTUAL
Gas/Fuel (not work)		\$
Auto Insurance		\$
Auto Repairs and Maintenance		\$
Parking		\$
Other		\$
Other		\$
Total Transportation Expenses		\$ 0.00

FINANCIAL OBLIGATIONS	PRIORITY	YOUR ACTUAL
Long-Term Savings		\$
Retirement Fund		\$
Credit Card Payments		\$
Auto Loan 1		\$
Student Loan 1		\$
Tuition		\$
Other		\$
Other		\$
Total Financial Expenses		\$ 0.00

SUBSCRIPTION EXPENSES	PRIORITY	YOUR ACTUAL
Magazines		\$
Newspaper		\$
Total Subscription Expenses		\$ 0.00

Personal Expense Budget Sheet (cont.)

VACATION EXPENSES	PRIORITY	YOUR ACTUAL
Airline Tickets		\$
Accommodations		\$
Food		\$
Rental Car		\$
Other		\$
Other		\$
Total Vacation Expenses		\$ 0.00

RECREATIONAL EXPENSES	PRIORITY	YOUR ACTUAL
Cable/TV		\$
Streaming		\$
Dining Out		\$
Gym Membership		\$
Other		\$
Other		\$
Total Recreational Expenses		\$ 0.00

BUSINESS EXPENSE BUDGET	
ACCOUNT	YEARLY AMOUNT
Accounting	\$
Advertising	\$
Automobile:	
• Fuel	\$
• Insurance	\$
• Lease	\$
• Repair/Maintenance	\$
• Tolls	\$
Bank Charges	\$
Broker	\$
Computer Software	\$
Contract Labor	\$
Copies	\$
Depreciation	\$
Dues:	
• Board	\$
• MLS	\$
E&O Insurance	\$
Equipment	\$
Gifts	\$
Health Insurance	\$
Internet	\$
Lock Boxes	\$
Meals	\$
Miscellaneous	\$
Office Fees	\$
Printing	\$
Postage	\$
Rent	\$
Riders	\$
Salaries	\$
Signs	\$
Supplies	\$
Telephone	\$
TOTAL BUSINESS EXPENSES	\$ 0.00

COMMISSION RATE GUIDE

LISTING DEPARTMENT

- Small Listings (\$ _____) _____%
- Large Listings (\$ _____) _____%
- Doubles (seller is also buying) _____%
- Lots _____%
- Acreage _____%
- Commercial _____%
- Investors _____%
- Home Builders _____%
- Referral Given _____%
- Referral Received _____%
- Transaction Fee _____%
- Fee for Service \$_____/hr.

BUYER DEPARTMENT

- Small Listings (\$ _____) _____%
- Large Listings (\$ _____) _____%
- Doubles (seller is also buying) _____%
- Investors _____%
- Referral Given _____%
- Referral Received _____%
- Transaction Fee _____%
- Fee for Service \$_____/hr.

CONVERSION ESTIMATES

Use the following conservative estimates if agent has **never** tracked results:

LISTING CONVERSION RATES

LISTING DEPARTMENT	NETWORK	EXPIRED	FSBO	FARMING	JUST SOLD
Sales Percentage	50/67/80	50/67/80	50/67/80	50/67/80	50/67/80
Conversion Rate	75/85/95	50/70/90	50/70/90	50/70/90	50/70/90
Show-Up Rate	95	50/70/90	50/70/90	75/85/95	75/85/95
Set Rate	5/7/10	7/15/25	10/20/30	75/85/95	75/85/95
Talks Rate	95	15	80	.5/1/1.5	.001/.002

BUYER CONVERSION RATES

LISTING DEPARTMENT	NETWORK	OPEN HOUSE	FARM	PROPERTY CALLS	JUST SOLD	WEBSITES
Closed Percentage	90/95	90/95	90/95	90/95	90/95	90/95
Acceptance Rate	85/90/95	85/90/95	85/90/95	85/90/95	85/90/95	85/90/95
Written Rate	85/90/95	80/85/90	80/85/90	80/85/90	80/85/90	80/85/90
Car Ride Rate	70/80/90	60/70/80	60/70/80	60/70/80	60/70/80	60/70/80
Show-Up Rate	95	60/70/80	70/80/90	50/60/70	70/80/90	50/60/70
Set Rate	5/7/10	10/15/20	75/85/95	10/15/20	75/85/95	
Talks Rate	95	100	.5/1/1.5	90	.001/.002	

ALL ESTIMATES READ AS IF AGENT IS:

New or Average / Above Average / Excellent

BUYER ACCOUNTABILITY

MONTHLY BUYER ACCOUNTABILITY STANDARDS

	Network	Open House	Farm	Property Calls	Just Listed	Web Sites	Total
Accepted							
Written							
Car Rides							
Meetings							
Sets							
Talks							
Attempts				N/A		N/A	

Divide **all buyer performance standards** by number of months per year committed to business.

WEEKLY BUYER ACCOUNTABILITY STANDARDS

	Network	Open House	Farm	Property Calls	Just Listed	Web Sites	Total
Car Rides							
Meetings							
Sets							
Talks							
Attempts				N/A		N/A	

Divide **relevant buyer performance standards** by number of weeks per year committed to business.

DAILY BUYER ACTIVITY STANDARDS

	Network	Open House	Farm	Property Calls	Just Listed	Web Sites	Total
Talks							
Attempts				N/A		N/A	

Divide **relevant weekly accountability standards** by number of days per week committed to business.

MONTHLY LISTING ACCOUNTABILITY STANDARDS

	Network	Expired	FSBO	Farming	Just Sold
Taken ^L					
Meetings ^M					
Sets ^N					
Talks ^O					
Attempts ^P					

Divide **all listing performance standards** by the number of months per year committed to business.

WEEKLY LISTING ACCOUNTABILITY STANDARDS

	Network	Expired	FSBO	Farming	Just Sold
Meetings ^M					
Sets ^N					
Talks ^O					
Attempts ^P					

Divide **relevant listing performance standards** by number of weeks per year committed to business.

DAILY LISTING ACCOUNTABILITY STANDARDS

	Network	Expired	FSBO	Farming	Just Sold
Talks ^Q					
Attempts ^R					

Divide **relevant weekly accountability standards** by number of days per week committed to business.

