

Personal Action Plan

From _____ To _____

Sales Associate _____



ENTER YOUR DBA HERE

Personal and Confidential

Personal Action Plan

Use this valuable tool for career planning and goal setting. Understanding your career objectives will help you work with your coach and achieve greater success.

Situation Analysis - Review your business strategies from the past 12 months

1 Personal income	\$ _____
2 Number of new listings	_____
3 Average list price	\$ _____
4 Number of listings sold	_____
5 Average sales price of listings sold	\$ _____
6 Number of buyer sales	_____
7 Average price of buyer sales	\$ _____
8 Total number of sales	_____
9 Average sales price	\$ _____
10 Total number of cancelled sales	_____
11 Average number of prospecting hours each week	_____
12 Average number of hours worked each week	_____
13 List the sources of your last 10 clients (below)	_____
1 _____	6 _____
2 _____	7 _____
3 _____	8 _____
4 _____	9 _____
5 _____	10 _____

Major Objectives

Goal setting and planning are vital to your success. Determine your future objectives and identify areas for growth.

Objective	Projected Date	Task Achieved
To earn an annual personal income of \$		
To work an average of _____ hours per week		
To work a maximum of _____ days a week and take weekends off per month		
To spend _____ % of my personal income on personal promotion		
Utilize contact management tools (ex. LeadMinder) to organize prospecting strategies		
Respond to customer emails within one hour, whenever possible		
Purchase SmartPhone, Laptop, iPad, etc.		
Obtain and/or update my profile page on coldwellbanker.com		
Attend upcoming Rallies and GenBlue Conference		

Attend **Coldwell Banker University®** and industry classes (review course catalog via cbu.com)

1

2

3

Attend continuing education courses:

1

2

3

Other

1

2

3

Five-Year Personal Income Plan

How do you visualize your financial future? Define your personal income goals for the next five years.

YEAR

INCOME

2013

\$ _____

2014

\$ _____

2015

\$ _____

2016

\$ _____

2017

\$ _____

Production Targets

Define your goals for the coming year.

12-month Personal Income Commitment

\$ _____

Total number of sales (open)

Total number of sales (closed)

Number of new listings

Number of listings sold (open)

Number of listings sold (closed)

Listings sold (personal income)

* _____

Buyers sold (open)

Buyers sold (closed)

Number of outgoing referrals (sent)

Number of referrals (closed)

* _____

**together these should total 12-month Personal Income Commitment)*

Prospecting Plan

Use the list below to write down the percentage of your income the activity would generate, and then the dollar amount represented by that percentage.

(For example, if your Personal Income Commitment is \$100,000 and you feel that you will receive 10 percent of your income through phone prospecting, your actual income from these calls would be \$10,000)

Prospecting Activity	Percentage of Income	Actual Income
1 Sphere of influence		\$ -
2 Past clients/customers		\$ -
3 For Sale By Owner		\$ -
4 Expired listings		\$ -
5 Phone prospecting		\$ -
6 Open houses		\$ -
7 Referrals		\$ -
8 Social Media		
9 Other		\$ -
TOTAL	0%	\$ -

PROSPECTING PLAN STRATEGIES

What Coldwell Banker resources will you use when you engage in the above activities to achieve your prospecting objectives?

Visit the Coldwell Banker Works site at www.coldwellbankerworks.com for a complete overview of the resources and tools available to you (i.e. Profile Page to attract more customers).

1 _____
2 _____
3 _____
4 _____
5 _____

6 _____
7 _____
8 _____
9 _____
10 _____

MONTHLY PRODUCTION FORECAST

Estimate by month how you will achieve your income through listings, referrals, etc.

	New Listings Taken			Listings Sold			Buyers Controlled Sales			Outgoing Referrals		
MONTH	Target	Actual	Prior Year	Target	Actual	Prior Year	Target	Actual	Prior Year	Target	Actual	Prior Year
Jan												
Feb												
Mar												
Apr												
May												
Jun												
Jul												
Aug												
Sep												
Oct												
Nov												
Dec												
TOTAL	0	0	0	0	0	0	0	0	0	0	0	0

Personal Commitment

I have carefully considered my Personal Income Commitment, Production Targets and Prospecting Plan. Also, I agree to commit myself to the effort and hard work necessary to achieve these goals.

Date

Sales Associate

Date

Sales Manager