

Goal Worksheet	
I. Reflect: Review what made last year awesome; or not so.	
What am I most proud of?	
What unfinished business do I want to reschedule?	
What was I most excited about in the past year?	
Looking back, what should I have done differently?	
What new dream would I like to achieve?	
What fear held me back from achieving my goal?	
What bored me this past year that I'd like to change?	
What new, inspiring people would I like to bring into my life?	
Who do I want to get closer to this year?	

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Case No.	Case Name	Case Type	Case Status
1	Case 1	Case 1	Case 1
2	Case 2	Case 2	Case 2
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5	Case 5	Case 5	Case 5
6	Case 6	Case 6	Case 6
7	Case 7	Case 7	Case 7
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13	Case 13	Case 13	Case 13
14	Case 14	Case 14	Case 14
15	Case 15	Case 15	Case 15
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My Business Plan for \_\_\_\_\_

How much should a good real estate salesperson earn annually? \_\_\_\_\_

How much did I earn during the last 12 months? \_\_\_\_\_

My 12-month minimum income requirement is: \_\_\_\_\_ (What do I pay in bills?)

My 12-month projected commission income is: \_\_\_\_\_

Projected Listing Income \$ \_\_\_\_\_ % Total \_\_\_\_\_ # Required \_\_\_\_\_

Projected Selling Income \$ \_\_\_\_\_ % Total \_\_\_\_\_ # Required \_\_\_\_\_  
(Listing/Selling Income divided by average Listing/Selling Commission = # Required)

My average monthly listing income requirements \$ \_\_\_\_\_ # \_\_\_\_\_

My average monthly selling income requirements \$ \_\_\_\_\_ # \_\_\_\_\_

My average weekly income requirements \$ \_\_\_\_\_

(Total annual income divided by 50 weeks)

My seller prospect sources: \_\_\_\_\_

My buyer prospect sources: \_\_\_\_\_

If I exceed my minimum requirements by \$ \_\_\_\_\_ I will use the money to: (what do I really want to do?)

If I expect to increase my income during the next 12 months by \$ \_\_\_\_\_ I must do these things differently:

**Necessary Transactions**

Based on past experience, you can estimate the number and description of transactions that should be completed to generate an earnings goal. For listing agents, it is necessary to know what percentage of their listings typically expire. For selling agents, it is necessary to know what percentage of written offers fail. You can construct goals such as the following.

Sell \_\_\_\_\_ homes at \$ \_\_\_\_\_ to generate \$ \_\_\_\_\_.

List \_\_\_\_\_ homes and have \_\_\_\_\_ % sell at \$ \_\_\_\_\_ to generate \$ \_\_\_\_\_.

**Necessary Activities**

Finally, you can estimate the amount of activity necessary to complete targeted transactions. You should not overlook support activities and should take necessary expenses into account (and whether these expenses are deductible). Goals for necessary activities might look like the following.

To sell \_\_\_\_\_ homes, I must have \_\_\_\_\_ showings.

To have \_\_\_\_\_ showings, I must generate \_\_\_\_\_ buyer leads by \_\_\_\_\_ (date).

To generate \_\_\_\_\_ buyer leads, I must make \_\_\_\_\_ telephone calls and \_\_\_\_\_

(describe other activities, including marketing with related costs).

To list \_\_\_\_\_ homes, I must give \_\_\_\_\_ listing presentations.

To give \_\_\_\_\_ listing presentations, I must generate \_\_\_\_\_ seller leads by \_\_\_\_\_

(date).

To generate \_\_\_\_\_ seller leads, I must make \_\_\_\_\_ telephone calls

and \_\_\_\_\_

(describe other activities, including marketing, with related costs).