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?

Goal Worksheet (continued)

II. Define my area of attention.

What core areas of my life do I want to achieve results in (health, business, learning, helping others, etc.)?

III. Get specific. Develop three quantifiable outcomes.

Goal 1.

Goal 2.

Goal 3.

IV. Get leverage. Find a compelling/emotional reason why.

V. What are the small steps to accomplish each of the outcomes above?

1. a, b, c

2. a, b, c

3. a, b, c

VI. Schedule the small steps.

VII. Be accountable. Tell at least four other people my goals.

Name 1

Name 2

Name 3

Name 4

VIII. Review my progress weekly and monthly.

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).