

NORRIS & STEVENS SUCCESS PLANNING 2020

NAME: _____ DATE: _____

This is a planning template designed to assist you in clarifying your objectives for the year.

2020 GOAL PLANNING TEMPLATE

What was your gross earnings goal for 2019? _____

What was your actual YTD gross for 2019? _____

What was your actual YTD net for 2019? _____

What is your net earnings goal for 2020? _____

What do you have to gross to achieve your 2020 goal?

Budget your gross earnings that you are trying to achieve and adjust for up and down months if necessary.

JANUARY	APRIL	JULY	OCTOBER
\$	\$	\$	\$
FEBRUARY	MAY	AUGUST	NOVEMBER
\$	\$	\$	\$
MARCH	JUNE	SEPTEMBER	DECEMBER
\$	\$	\$	\$

If you achieved your goal, why were you successful? If not, why?

Areas of improvement: How are you going to do more and improve your work ethic in 2020? What are you going to do differently? What are you going to do better?

How will you improve your position in our real estate industry and community in 2020?

BRAND/IDENTITY

What are your A) Strengths B) Weaknesses?

A)

B)

What are you known for? (What is your “identity and brand”? Be as specific as possible.) What is your competitive advantage?

REVENUE DIAGNOSTICS

What percentage of the market you specialize in turns over in a year? _____

Do you see a shift in your market over last year? If yes, how will you alter your business model?

What is your average deal size in commissions?

Describe the average deal?

What is your average amount of hours you spend on each deal?

What percentages of the deals that you work on do not finish/close?

BUSINESS DEVELOPMENT

List your top ten key client relationships (individuals and company) from the current (or previous) year and the total production from each client.

Name	Company	\$
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

List ten relationships you would like to establish or enhance during the next year.

Name	Company	Activities to Develop These Relationships
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

How many prospects are you actively tracking? _____

Of these prospects, how many did you meet face-to-face this year? _____

CONTRIBUTION TO COMPANY & COMMUNITY

What community or business organizations are you currently a member of? If none, which will you join?

What positions would you like to hold within these organizations?

PERSONAL GOALS

What are your Personal short-term goals? What are the benefits to you when you achieve them?

What are your Personal long-term goals? What are the benefits to you when you achieve them?

ATTACH PIPELINE