

NORRIS & STEVENS SUCCESS PLANNING 2022

NAME: _____ DATE: _____

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

2022 GOAL PLANNING TEMPLATE

Gross commission revenue goal for 2021 _____

Through 11/2021, what was your actual YTD gross? _____

Gross commission revenue goal for 2022? _____

Are you an **independent contractor** or **employee-based** broker?

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

Areas of improvement: How are you going to improve your work ethic in 2022? What are you going to do differently? What are you going to do better?

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 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?

INSPECT THE BASKETS

Prospects

(Who you don't currently do business with, but would like to)

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____
- 9. _____
- 10. _____
- 11. _____
- 12. _____
- 13. _____
- 14. _____
- 15. _____
- 16. _____
- 17. _____
- 18. _____
- 19. _____
- 20. _____

Customers

(Who you have done business with, but not repeatedly)

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____
- 9. _____
- 10. _____

Clients

(Repeat customers, good clients)

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____
- 9. _____
- 10. _____

CONTRIBUTION TO COMPANY & COMMUNITY

What community, educational, charitable, or business organizations are you currently a member of? If none, which would you like to join?

What positions would you like to hold within these organizations?

PERSONAL GOALS

What are your Personal short-term goals?

What are your Personal long-term goals?

What are you going to commit to do differently/additionally to build business in 2022?

What are the metrics (i.e. how many calls/day, how may meetings/week, how many proposals/month, escrows, leases, closings)?

How are you going to hold yourself accountable to accomplish those metrics?

ATTACH PIPELINE: