



Team Member Evaluation

BROKER NAME:

DATE:

This is a business plan template designed to assist you in clarifying your objectives for the short and medium term.

1. What do you want to be known for? What is your “identity and brand”?

2. Who do you want to know it?

3. How do you intend to get the message across?

4. What are your (A) Strengths (B) Weaknesses?

A: _____

B: _____

5. Where do you see your business coming from this year? Do you have a specific focus?

6. How do you intend to pursue the business that you have identified above?

7. What is your personal production goal?

8. How many deals do you expect to complete and what is your average deal size?

9. What percent of your production is derived from listing vs. selling side?

10. How many listings do you have? Do you have enough to achieve your goals?

11. How are you going to secure more listings in order to achieve your goals?

12. What are your cold calling goals?

# of Completed Calls - Weekly	# of Completed Calls - Monthly	# of Completed Calls - Quarterly

BUSINESS DEVELOPMENT

1. List 5 relationships you would like to establish or strengthen in the year ahead.

Name	Company	Key activity to develop this relationship
1.		
2.		
3.		
4.		
5.		

2. List your top 6 client relationships from the current year and the total production from each (expected or earned).

Client	\$	Client	\$
1.		4.	
2.		5.	
3.		6.	

3. a) How many prospects are you in regular contact with?

b) Of these prospects, how many have you met face-to-face in the past three months?

4. How many listings and mandates are you currently quarterbacking?

Listings _____ Mandates _____

Your top 6 mandates:

Company	Potential Revenue	Time until completion	Company	Potential Revenue	Time until completion
1.			4.		
2.			5.		
3.			6.		

5. Where will you and where have you travelled outside of Edmonton to strengthen client relationships this year? Next 6 months?

CONTRIBUTION TO THE COMMUNITY

1. What community or business organizations are you currently a member of? Which others will you join?

PROFESSIONAL DEVELOPMENT

1. What courses or seminars have you recently taken or would like to take?

2. Do you presently hold any professional designations or certifications?

3. What professional designation or certifications do you plan on obtaining and when?

SALES PRODUCTION

1. Your revenue target for the calendar year:

\$ _____

2. Your actual revenue year to date:

\$ _____

3. What is your greatest contribution to your team? What is your unique strength?

4. What are the priorities that you need to carry out to fulfill the goals you set out for this year?
