



The Assessment – Methods to Success

Name: _____

Date: _____

eMail: _____

Phone: _____

Company: _____

Years in RE: _____

Your Current Business Snapshot

	Gross Commission	Net Income	Sales Volume	Units
Last Year				
YTD				
Pending				
Goals				

Your Ave. Sales Price	Your DOM	% Listings	% Sales	

What is your exit strategy? _____

Do you currently have / effectively use:

<input type="checkbox"/> Business Plan	<input type="checkbox"/> LLC/ Business Entity
<input type="checkbox"/> Written Goals	<input type="checkbox"/> Business Checking Account
<input type="checkbox"/> Business Budget	<input type="checkbox"/> Business Credit Card
<input type="checkbox"/> Personal/Home Budget	<input type="checkbox"/> Pay quarterly taxes
<input type="checkbox"/> Income & Expense Report (P&L)	<input type="checkbox"/> CPA / Accountant

Primary Sources of Business (Either by % or units)

Past Clients/ Referrals/SOI		Online Marketing	
Open Houses		Sign Calls	
Expireds/FSBOs		Cold Calling	
Farming		Just Listed/Solds	
Advertising		Door Knocking	
Networking			
Your Website			

Notes:



Your Message & Brand

What do you want your clients to resonate with about you and your business?

What is your point(s) of differentiation? _____

Do you have a logo or specific personal brand? _____

Do you have personally branded marketing materials? _____

Is your branding consistent online & offline? _____

Are you using video in your branding/marketing plan? _____

Are you actively requesting and receiving client testimonials/recommendations? _____

___ Zillow ___ LinkedIn ___ Yelp ___ Other: _____

Notes:

Your Connections

Do you have a past client/SOI list(s)? _____ How many on list? _____

What CRM/transaction management software do you use? _____

How often do you contact your database and how? _____

Client Care/Appreciation Program? _____

Describe your current referral system _____

Are you using social media effectively to build relationships? _____

Notes:

Working with Home Sellers

Do you have a formal listing presentation? _____

Do you use a digital version? Use a tablet or iPad to present? _____

Do you use a leave-behind or pre-listing package? _____

Do you have a written marketing/service commitment? _____

Are you using a seller action / follow-up plan? _____

How do you prospect for listings – check all that apply:

<input type="checkbox"/> My database	<input type="checkbox"/> Print Advertising	<input type="checkbox"/> Agent referrals
<input type="checkbox"/> Farming	<input type="checkbox"/> Paid Lead Generation	<input type="checkbox"/>
<input type="checkbox"/> Expireds	<input type="checkbox"/> Zillow/Trulia Advertising	<input type="checkbox"/>
<input type="checkbox"/> FSBOs	<input type="checkbox"/> Realtor.com advertising	<input type="checkbox"/>
<input type="checkbox"/> Social Media	<input type="checkbox"/> Just Listed/Sold	<input type="checkbox"/>

What specific marketing do you do for your listings – check all that apply:

<input type="checkbox"/> Professional Photos	<input type="checkbox"/> Featured Listings	<input type="checkbox"/> Social Media
<input type="checkbox"/> Video Tour	<input type="checkbox"/> Your website	<input type="checkbox"/> Direct mail
<input type="checkbox"/> Single Property Website	<input type="checkbox"/> eBlasts	<input type="checkbox"/> Property Brochures
<input type="checkbox"/> Sign riders/call capture	<input type="checkbox"/> Print Advertising	<input type="checkbox"/> Home magazine(s)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Notes:

Farming Details

Do you have a geographical Farm(s)? ____ YES ____ NO How many homes? _____

Professional/Other Niche Farm: _____ Total on List: _____

Describe your current farming activities: _____

Notes:

Working with Home Buyers

Do you conduct a Buyer's Interview? _____

Do you have a Buyer Presentation/Consultation Guide? _____

How do you follow-up with prospective buyers? _____

Notes:

Your Transaction Methodology

Describe your escrow tracking system? _____

Do you use a paperless transaction management system? _____

Client follow-up system – after the transaction? _____

Notes:

Agent Team Building

Do you currently have a team? ____ YES ____ NO If NO, do you want to build a team? _____

If YES, do you have (check all that apply)?

<input type="checkbox"/> Admin Assistant	<input type="checkbox"/> Transaction Coordinator
<input type="checkbox"/> Virtual Assistant	<input type="checkbox"/> Team or Leads Manager
<input type="checkbox"/> Buyer's Agents # _____	<input type="checkbox"/> Listing Specialists # _____
<input type="checkbox"/> Team systems in place	<input type="checkbox"/> Job descriptions/ agreements

Notes:

Your Future Business

List any other lead generation programs or strategies you currently use:

Paid SEO-SEM/ PPC/ Google Ads? _____

Paid Lead generation service/platform? _____

Other: _____

Websites/Blogs / Real Estate sites – please provide links:

<input type="checkbox"/> Primary Website	
<input type="checkbox"/> Other site/Blog	
<input type="checkbox"/> Active Rain	
<input type="checkbox"/> Zillow Profile	
<input type="checkbox"/> Trulia profile	
<input type="checkbox"/> Realtor.com	
<input type="checkbox"/>	
<input type="checkbox"/>	

What is your Social Media Marketing Strategy? _____

Check social media platforms you are using and the link to your profile:

<input type="checkbox"/> Facebook Profile	
<input type="checkbox"/> Facebook Page	
<input type="checkbox"/> LinkedIn	
<input type="checkbox"/> Pinterest	
<input type="checkbox"/> YouTube	
<input type="checkbox"/> Twitter	
<input type="checkbox"/> Vimeo	
<input type="checkbox"/> Instagram	
<input type="checkbox"/> Google+	
<input type="checkbox"/>	

Notes:

Initial Priorities for Coaching Sessions

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

Notes:
