

# Agent Business Analysis

*"You cannot change the destination overnight, but you can change the direction overnight" - Jim Rohn.*

## A. Financial / Business Review:

1. How many transactions did you do in the past year? \_\_\_\_\_
2. What were your gross commissions in the past year? \_\_\_\_\_
3. What is your average commission per sale? \_\_\_\_\_
4. How many of your clients were:  
Buyers? # \_\_\_\_\_ % \_\_\_\_\_ Sellers? # \_\_\_\_\_ % \_\_\_\_\_  
(to calculate the percentage, divide the # of either Buyer or Seller transactions by the total number of transactions completed)
5. # of Buyer Agency Contracts Signed \_\_\_\_\_
6. How many buyers did you lose? \_\_\_\_\_  
Why do you think this happened? \_\_\_\_\_  
\_\_\_\_\_
7. # of Buyers Sold \_\_\_\_\_
8. Buyer Conversion Rate (divide Buyers Sold by total number of Buyers worked with)  
\_\_\_\_\_ %
9. # of Listing Presentations \_\_\_\_\_
10. # of Listings Taken \_\_\_\_\_
11. How many listings did you loose \_\_\_\_\_  
Why do you think that this happened? \_\_\_\_\_  
\_\_\_\_\_
12. # of Listings Sold \_\_\_\_\_
13. % Of Listing Presentations vs. Listings Sold (divide the Listings Sold by the Listing Presentation Number) \_\_\_\_\_ %
14. % Of Listings Sold (divide Listings Sold by total number of Listings taken)  
\_\_\_\_\_ %

## B. Where Did My Business Come From?

How did you originate your buyers and sellers in the past year?

Source	Buyer	Seller
Open Houses	_____	_____
Sphere of Influence Referral	_____	_____
Past Client	_____	_____
Sign Calls	_____	_____
Personal Web Site	_____	_____
StreetText.com	_____	_____
Trulia.com	_____	_____
Zillow.com	_____	_____
Realtor.com	_____	_____
Social Networking Site	_____	_____
Call Rotation Roster/Phone Time (Office)	_____	_____
Referral from the agency	_____	_____
Referral from outside agency	_____	_____
Direct Mail Farming	_____	_____
Ad Calls	_____	_____
Other _____	_____	_____
Other _____	_____	_____
Other _____	_____	_____
Other _____	_____	_____

## C. Market Review:

Search how many active homes

1. Do you know your market? \_\_\_\_\_
2. How many households are in your market area / farm area \_\_\_\_\_
3. How many transactions took place last year in this area? \_\_\_\_\_
4. How many agents are you competing with in this area? (actually doing business)?  
\_\_\_\_\_
5. What companies / agents are your biggest competitors? \_\_\_\_\_
6. What is your companies' market share vs. the competition? \_\_\_\_\_
7. Do you know what your competition leverages to attract buyers and sellers?  
\_\_\_\_\_

8. What are the biggest impending changes or threats in your marketplace?

\_\_\_\_\_

9. What are the emerging opportunities in your marketplace?

\_\_\_\_\_

10. What three things will you do to improve your market knowledge, combat the competition and take advantage of the emerging opportunities in your market?

A) \_\_\_\_\_

B) \_\_\_\_\_

C) \_\_\_\_\_

Will you do them? \_\_\_\_\_

#### **D. Sellers:**

1. On average how long do your listings take to sell? \_\_\_\_\_

2. Is this above or below the areas average? \_\_\_\_\_

3. Do you have a finely tuned listing presentation complete with Marketing / Action Plan outlining your marketing, service and communication plans? \_\_\_\_\_

4. Do you include in your listing presentations information about the power of your brand and the exposure that it provides? \_\_\_\_\_

5. Do you have a checklist for listing appointments? \_\_\_\_\_

6. Do you have a full e-marketing strategy to provide maximum exposure for listings?

\_\_\_\_\_

7. Do you enhance your listings on Realtor.com and other real estate websites?

\_\_\_\_\_

8. How do you promote you open houses? \_\_\_\_\_

9. Do you advertise your open houses on-line... do you post them on all the real estate websites that do not offer automatic feed? \_\_\_\_\_

10. Do you do web commercials, slide shows, virtual tours for every listing? \_\_\_\_\_  
if not why not? \_\_\_\_\_

11. Do you email all of the top REALTORS in your area a web commercial of your listing?

\_\_\_\_\_

If not why not? \_\_\_\_\_

12. Do you include testimonials from past Sellers in your listing presentation? \_\_\_\_\_  
If not why not? \_\_\_\_\_

13. What are the top three tools that you use to get the unfair advantage at the listing table? \_\_\_\_\_

14. Do you try to generate "spin-off" business around your listings? \_\_\_\_\_  
How? \_\_\_\_\_

15. Do you survey your seller clients? \_\_\_\_\_  
If not, why not? \_\_\_\_\_

16. Do you send handwritten thank you notes to your Sellers after the listing appointment, after a contract is negotiated and after the sale? \_\_\_\_\_

17. Do you do a pop by after the sale with a small gift? \_\_\_\_\_

18. Do you ask your Sellers for referrals? \_\_\_\_\_

19. Do you have a database of past sellers? \_\_\_\_\_

20. What is your plan for keeping in touch with Sellers after the sale and prospecting them for referrals? \_\_\_\_\_  
Are you consistent with these activities for every listing? \_\_\_\_\_

21. What are three things you could do to improve the number of your listings, listing/sales ratio and spin off business for next year?

A) \_\_\_\_\_

B) \_\_\_\_\_

C) \_\_\_\_\_

Will you do them? \_\_\_\_\_

22. What are three things that you should stop doing?

A) \_\_\_\_\_

B) \_\_\_\_\_

C) \_\_\_\_\_

Will you stop doing them doing them? \_\_\_\_\_

## **E. Buyers**

1. Do you have a Buyer's Presentation complete with services etc? \_\_\_\_\_

2. Do you include testimonials from past customers? \_\_\_\_\_
3. Do you include information on the process of buying a home and the costs involved?  
\_\_\_\_\_
4. Do you include a list of preferred ancillary service providers? \_\_\_\_\_
5. Do you belong to an ancillary services networking community? \_\_\_\_\_
6. Do you ask all of your buyer clients to sign a services contract/B.R.Agrmt.?  
\_\_\_\_\_
7. Do you provide a service guarantee to buyers? \_\_\_\_\_
8. Do you conduct a buyer consultation session for each buyer client? \_\_\_\_\_
9. Do you provide a buyer CMA when a Buyer is considering putting an offer on a property?  
\_\_\_\_\_
10. Do you sign up all of your buyers to receive email updates on new listings?  
\_\_\_\_\_
11. Do you send buyers handwritten notes after you first meet with them, after they have successfully negotiated an offer, after all contingencies have been removed and after the closing? \_\_\_\_\_
12. Do you send buyers a handwritten note of encouragement if their offer doesn't go through?  
\_\_\_\_\_
13. Do you create a web commercial of the buyer's new home and email it to them?  
\_\_\_\_\_
14. Do you survey your buyers and ask for a testimonial? \_\_\_\_\_  
  
Why not? \_\_\_\_\_
15. Do you offer to create a change of address card for your buyers with their picture on the front of the card and a testimonial about your service on the back? \_\_\_\_\_
16. Do you pop by to visit your buyers in their new home with a small closing gift?  
\_\_\_\_\_
17. Do you ask your buyers for referrals? \_\_\_\_\_
18. Do you put all of your buyers in a database? \_\_\_\_\_

19. How do you keep in constant contact with your buyer after the sale and how do you prospect for referrals? \_\_\_\_\_

20. What activities / campaigns were your best sources of finding new buyer clients?  
\_\_\_\_\_

21. Is there a profile of the type of buyers you enjoy working with the most? \_\_\_\_\_

22. How did you target market that buyer group? \_\_\_\_\_

23. What are three things you could improve to attract and close buyers for next year?

A) \_\_\_\_\_

B) \_\_\_\_\_

C) \_\_\_\_\_

Will you do them? \_\_\_\_\_

24. What are three things that you should stop doing?

A) \_\_\_\_\_

B) \_\_\_\_\_

C) \_\_\_\_\_

Will you stop doing them doing them? \_\_\_\_\_

## **F. Personal Marketing/Promotion/Advertising**

1. How much money did you spend on personal promotion last year? \_\_\_\_\_

What did you do? \_\_\_\_\_

Did you get the return you expected? \_\_\_\_\_

Have you created a personal brochure? \_\_\_\_\_

2. How much money did you spend on print advertising? \_\_\_\_\_

Did you get the return you expected? \_\_\_\_\_

How much print advertising do you promise sellers in your listing presentation?  
\_\_\_\_\_

3. Do you advertise testimonials, client survey results or your service package?  
\_\_\_\_\_

If not, why not? \_\_\_\_\_

4. What are three things you could do to increase your success rate from your personal marketing, promotion and advertising?

A) \_\_\_\_\_

B) \_\_\_\_\_

C) \_\_\_\_\_

Will you do them? \_\_\_\_\_

5. What are three things that you should stop doing?

A) \_\_\_\_\_

B) \_\_\_\_\_

C) \_\_\_\_\_

Will you stop doing them doing them? \_\_\_\_\_

## G. Prospecting for New Business

1. Do you schedule set time / time block to actively prospect for new business?

2. How often do you prospect for new business?

Daily \_\_\_\_\_ Weekly \_\_\_\_\_ Monthly \_\_\_\_\_ Occasionally \_\_\_\_\_

Are you Consistent? \_\_\_\_\_ Persistent? \_\_\_\_\_ Determined? \_\_\_\_\_

3. What percent of your time do you prospect for new business? \_\_\_\_\_

Is it enough? \_\_\_\_\_

Did you treat Online Leads like your Sphere of Influence? \_\_\_\_\_

Did you contact every lead you collected? \_\_\_\_\_

If not why? \_\_\_\_\_

How many attempts did you make to contact your leads? \_\_\_\_\_

Did you email or text every lead with the right contact details \_\_\_\_\_

Did you try or test something new to make contact with difficult leads? \_\_\_\_\_

4. Do you have short term prospecting goals? \_\_\_\_\_

5. Do you have long term prospecting goals? \_\_\_\_\_

Which prospecting activities do you do most often? \_\_\_\_\_

6. Are you satisfied with the results? \_\_\_\_\_

7. Which prospecting activities do you never do? \_\_\_\_\_

Why? \_\_\_\_\_

8. How do you prospect for FSBO's? \_\_\_\_\_

9. How do you prospect for Expireds? \_\_\_\_\_

10. Do you have specific scripts you use for prospecting? \_\_\_\_\_

11. Do you have a system in place to stay in touch with and prospect past clients for referrals? \_\_\_\_\_

How often? \_\_\_\_\_

What methods do you use? \_\_\_\_\_

Are you getting enough business from your past clients? \_\_\_\_\_

12. Do you have a system in place to stay in touch with and prospect your Sphere of Influence? \_\_\_\_\_

How often? \_\_\_\_\_

What methods do you use? \_\_\_\_\_

Are you getting enough business from your sphere? \_\_\_\_\_

13. What percentage of your business last year came from past client referrals & sphere of influence? \_\_\_\_\_

14. How will you prospect to attract clients from generation X / Millennials?  
\_\_\_\_\_

15. What three things can you do to improve your success in prospecting for new business?

A) \_\_\_\_\_

B) \_\_\_\_\_

C) \_\_\_\_\_

Will you do them? \_\_\_\_\_

16. What are three things that you should stop doing?

A) \_\_\_\_\_

B) \_\_\_\_\_

C) \_\_\_\_\_

Will you stop doing them doing them? \_\_\_\_\_

## H. Technology

1. Do you have contact management software (CRM)? \_\_\_\_\_

Do you use it? \_\_\_\_\_

Presentation software? \_\_\_\_\_

Other software? \_\_\_\_\_

2. Do you use e-mail & text for your business? \_\_\_\_\_

Video? \_\_\_\_\_

3. Do you use a personally branded email address for business? \_\_\_\_\_



4. Do you use e-mail to prospect for new business What software do you use to send out mass emails to top agents in the area, past clients etc. (topproducer.com, constantcontact.com, mailchimp.com?) \_\_\_\_\_

5. Do you have an email newsletter? \_\_\_\_\_

6. Do you have a smart phone? \_\_\_\_\_

7. Do you have a compelling personal web site and what makes it compelling?  
\_\_\_\_\_

8. Is it targeted for both buyers and sellers? \_\_\_\_\_

9. Do you have buyer and seller testimonials on your site? \_\_\_\_\_

10. Do you have a lot of website visitors? \_\_\_\_\_

If not why? \_\_\_\_\_

11. Do you tell the world about your web site? \_\_\_\_\_

If not why? \_\_\_\_\_

12. Is your web address on all of your marketing including your for sale signs?  
\_\_\_\_\_

13. How quickly do you get back to internet leads? \_\_\_\_\_

14. What systems do you have in place to manage and incubate these internet leads?  
\_\_\_\_\_

15. Do you have a real estate blog site? (www.realblogging.com, www.blogger.com, Active Rain

) \_\_\_\_\_

16. How are you utilizing social networking in your business? \_\_\_\_\_

17. Should your technology skills be improved? \_\_\_\_\_

18. What three things could you do to improve your technology skills and the impact that you have with technology with regards to the real estate industry?

A) \_\_\_\_\_

B) \_\_\_\_\_

C) \_\_\_\_\_

Will you do them? \_\_\_\_\_

19. What are three things that you should stop doing?

- A) \_\_\_\_\_
- B) \_\_\_\_\_
- C) \_\_\_\_\_

Will you stop doing them doing them? \_\_\_\_\_

## I. General & Educational

1. What skills, upgrading and educational opportunities did you take last year?  
\_\_\_\_\_

2. How many company events did you attend last year? \_\_\_\_\_  
What designations did you achieve? \_\_\_\_\_

3. What educational & business growth books did you read last year?  
\_\_\_\_\_

4. Have you recently upgraded your communication and/or human relation skills?  
\_\_\_\_\_

5. How are you keeping up with industry changes and innovations? (realtymedia.com, rismedia.com, inmannews.com) \_\_\_\_\_

6. How are you keeping up with local industry laws and regulations? \_\_\_\_\_

7. Are you active with your local Board of Realtors? \_\_\_\_\_

B. How are you giving back to your community? \_\_\_\_\_

9. Did you set written goals last year? \_\_\_\_\_

Did you achieve them? \_\_\_\_\_

10. Did you stick to a written schedule last year? \_\_\_\_\_

11. What was your biggest business challenge in the past year how did you overcome it?  
\_\_\_\_\_

12. What three things could you do to improve your general situation specifically with regard to market knowledge, financing, education, goal setting or anything else?

- A) \_\_\_\_\_
- B) \_\_\_\_\_
- C) \_\_\_\_\_

Will you do them? \_\_\_\_\_

9. What are three things that you should stop doing?

A) \_\_\_\_\_

B) \_\_\_\_\_

C) \_\_\_\_\_

Will you stop doing them doing them? \_\_\_\_\_

## J. Synopsis

**My major strengths are:**

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4) \_\_\_\_\_

5) \_\_\_\_\_

**My major weaknesses are:**

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4) \_\_\_\_\_

5) \_\_\_\_\_

**My greatest opportunities are:**

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4) \_\_\_\_\_

5) \_\_\_\_\_

**Things I can do to improve are:**

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4) \_\_\_\_\_

5) \_\_\_\_\_

**Things that I need to stop doing are:**

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4) \_\_\_\_\_

5) \_\_\_\_\_

Remember, work to your strengths - improve your weaknesses - take advantage of your opportunities!

And, work to your plan every day!

## **K. Objectives**

My objectives for the next year are as follows:

- |    |     |
|----|-----|
| 1. | 7.  |
| 2. | 8.  |
| 3. | 9.  |
| 4. | 10. |
| 5. | 11. |
| 6. | 12. |

### **Personal Business Action Plan**

Insert the highest 6 priority objectives from above and select when it will be achieved.

Objective 1:

By when: \_\_\_\_\_

Objective 2:

By when: \_\_\_\_\_

Objective 3:

By when: \_\_\_\_\_

Objective 4:

By when: \_\_\_\_\_

Objective 5:

By when: \_\_\_\_\_

Objective 6:

By when: \_\_\_\_\_