

Business Plan Three-Month Review

To capture your answers, put your cursor in the blanks and fill in the blanks. Save to your desired folder. This is just the big picture. To find out whether your daily/weekly activities are leading you to the results you want, count the number of lead generating activities you do in a day, week, and month. Compare that to the ratios in [*Up and Running in 30 Days*](#) or [*Up and Running in Real Estate*](#) (online business planning for determined agents) See if you're doing the amount of lead generating activities needed to reach your goals.

For months: _____

Quarterly goals/actuals: Listings taken	G: _____	A: _____
Listings sold	G: _____	A: _____
Sales	G: _____	A: _____

Sales Effectiveness

1. *Management by the Numbers*

My analysis of my activities/results to date: _____

My analysis of my expenses/profitability to date: _____

Adjustments I need to make: _____

2. *Marketing*

My analysis of my results from specific target markets: _____

My analysis of my specific promotional tactics effectiveness: _____

Changes I need to make: _____

3. *Professional Development*

My analysis of my accomplishments: _____

Adjustments I need to make: _____

4. *The Big Picture*

Does my stated focus match the results of my activities and my overall business objectives for this year?

Adjustments I need to make: _____

