

Goals help you understand what activity you need to do each week to achieve a long-term goal. Use this sheet to get started and create a two-year plan.

What annual salary do you need to be happy \$

Write down a list of things
you are good at:

Look at the list of things you are good at
and think about what activities align with
these skills or talents that you listed.

Write some ideas down:

Write down a list of things
you are not good at:

STOP HERE: This part is to be filled out together with your mentor

How much money do you currently make \$

What is the gap between current income and goal \$

What activities are generating your income today?

Based on 2.25% average commission, how much gross commission do you need to produce to cover the gap \$

How many homes per year do you need to sell based on \$700K average home price #

Where is the breakeven to leave full-time job

#

\$

Key Performance Indicators (KPI)

Activity by Month

| SOI | Calls/Email | Leads |
|---------------------|-------------|-------|
| Networking Meetings | | |
| Bank Visits | | |
| CMA Meetings | | |
| Opportunities: | | |

Notes:

Put a check
next to each:

- ☐ Website
- ☐ Facebook
- ☐ Instagram
- ☐ Twitter
- ☐ TikTok
- ☐ Youtube
- ☐ LinkedIn
- ☐ Other Social
- ☐ Podcast
- ☐ Media Sites
- ☐ Print Ads
- ☐ TV / Radio
- ☐ Sponsorships
- ☐ Speaking

Based on the information above, where should you be spending
your time on lead generation?

List four ideas that can help you grow your business:

1

2

3

4