



Sales Client Mid-Year Review

Name: _____ Date: _____

Company: _____ Years in Business _____

1. My best year ever was _____ (year)

(a) Production Units: _____ Volume _____ Commission _____

2. My 2025 goal is: _____ Volume

_____ Commission

_____ Units

3. My goals are written: Yes _____ No _____

4. My goals (business plan) are broken down to daily numbers? Yes _____ No _____

5. My year to date numbers are:

_____ Volume

_____ Commission

_____ Units

6. I am ahead _____ behind _____ on track _____ to reach my 2025 goals. (Check one)

7. The reason my business is growing / declining is: _____

8. Rate the following peak performance areas on a scale of 1-5 with 5 being high and your skill/proficiency in the following disciplines:

Skill Rating: 5-Excellent, 4-Good, 3-Average, 2-Fair, 1-Poor

| | Consistency Disciplines | Rating (1-5) |
|-----|--|---------------------|
| 1. | Actively prospects daily / consistently | |
| 2. | Time management: plans work; schedules by appointment; sets time for HPOA | |
| 3. | Controls: business; client expectation; time | |
| 4. | Effectively utilizes a contact management system to manage leads / clients and ensure proper follow up | |
| 5. | Has specific written goals / plans and reviews regularly | |
| 6. | Utilizes a scripted process and routinely role plays / rehearse | |
| 7. | Regularly sets time to work and improve business (business development) | |
| 8. | Consistently works on self-improvement: books, CD's, training | |
| 9. | Consistently contacts sphere / past to gain referrals | |
| 10. | Tracks production and understands: sales conversion ratios, YTD numbers, lead source % | |
| | Rank _____ | Total |

| Consistency Ranking | |
|----------------------------|---------------------------|
| Score | Rank |
| 45 - 50 | Thriver |
| 30 - 44 | Surviving Thriver |
| 15 - 29 | Sandbagger |
| 0 - 14 | Statistic (or soon to be) |

| | Persistency Disciplines | Rating (1-5) |
|----|---|---------------------|
| 1. | Identifies all smoke screen objections and has a strategic response for each one? | |
| 2. | Gets to the bottom-line objection and rarely gets stalled in the sales process | |
| 3. | Appropriately follows up with warm/hot leads and utilizes a contact management system | |
| 4. | Possesses a never give up attitude | |
| 5. | Perseveres well through trials, tribulations and challenges | |
| | Rank _____ | Total |

| Persistence Ranking | |
|----------------------------|---------------------------|
| Score | Rank |
| 21 - 25 | Thrivers |
| 16 - 20 | Surviving Thrivers |
| 11 - 15 | Sandbagger |
| 0 - 10 | Statistic (or soon to be) |

| | Attitude Disciplines | Rating (1-5) |
|----|--|---------------------|
| 1. | Sees the opportunity in the problem | |
| 2. | Sees attitude as determining altitude (success level) | |
| 3. | Spends more time encouraging/motivating others than others motivating/encouraging self | |
| 4. | Positively project: self, company and opportunities | |
| 5. | Positively deals with the brutal facts and doesn't let Pollyanna cloud reality | |
| | Rank _____ | Total |

| Attitude Ranking | |
|-------------------------|---------------------------|
| Score | Rank |
| 21 - 25 | Thrivers |
| 16 - 20 | Surviving Thrivers |
| 11 - 15 | Sandbagger |
| 0 - 10 | Statistic (or soon to be) |

| | Confidence Disciplines | Rating (1-5) |
|----|--|---------------------|
| 1. | Projects a high level of confidence to accomplish task | |
| 2. | Prospects / clients routinely select you as their preferred agent over competitors | |
| 3. | Has an overall high self confidence level | |
| 4. | Has a high confidence level in company and management | |
| 5. | Has a high confidence level in personal inventory/service/product line | |
| | Rank _____ | Total |

| Confidence Ranking | |
|---------------------------|---------------------------|
| Score | Rank |
| 21 - 25 | Thriver |
| 16 - 20 | Surviving Thriver |
| 11 - 15 | Sandbagger |
| 0 - 10 | Statistic (or soon to be) |

Overall Peak Performance Rank

Consistency: Rank _____ Score _____

Persistence: Rank _____ Score _____

Attitude: Rank _____ Score _____

Confidence: Rank _____ Score _____

Overall Rank _____ Total _____

| | | |
|-----------------------------------|----------|-----------------------------|
| If your overall score is between: | 108 -125 | = Thriver |
| | 78 -107 | = Surviving Thriver |
| | 48 - 77 | = Sandbagger |
| | 0 - 47 | = Statistic (or soon to be) |

9. My outlook on the market is:

10. My commitment level to succeed in this market is: (scale 1-10 with 10 being high)

11. The disciplines, mindsets and skill sets I need to implement immediately to ensure I thrive and run at peak performance are: (Refer to Peak Performance rating and write down any discipline you scored 3 or lower on)

12. My game plan to implement the above disciplines is: _____
and advance my business now.

13. I am receiving my business development support from:

| | |
|------------------------|--------------|
| Manager / Broker _____ | Self _____ |
| Mentor / Coach _____ | No one _____ |

14. I have a well-defined sales process that I follow and know where the sale failed if it does.

| | |
|-----------|----------------|
| Yes _____ | Somewhat _____ |
| No _____ | |



The 6 Foundational Corners Checklist

| | | Yes | No | Partial |
|----|--|-----|----|---------|
| 1. | <u>Business Plan</u> I have a well-defined business plan in place – down to specific daily goals, I also review my plan regularly. | | | |
| 2. | <u>Time Management /Blocking</u> I time block my day, control time, clients and accomplish my tasks when I want to. I schedule appointments when I am available. | | | |
| 3. | <u>Prospect Plan</u> I know my primary lead sources and have a plan to contact them on a regular basis. I prospect daily and make the number of contacts my business plan states to make each day. | | | |
| 4. | <u>Database Lead Management</u> I manage my leads from the same CRM, log all my conversations and outreach attempts. | | | |
| 5. | <u>Sales Process</u> I have a well-defined sales process that I follow and know where I missed a step. I help my clients buy their way and my sales conversions are very high. | | | |
| 6. | <u>Production Tracking</u> I know my: conversion ratios, listing days on market, sale pending numbers, average sales price/commission and how my YTD numbers stack up against my goals. | | | |

The areas I answered no or partial are: _____

My game plan to improve is: _____
