



Business Analysis

Great things never come with a comfort zone

Business Analysis Last 12 Months



An analysis of your prior year's (rolling 12 months) is a good method for understanding those activities that are currently working in your business and those that are not.

Step 1: Last 12 Months Closed Business – Please complete the following form regarding your closed transactions. If you would like to a more extensive study, you are welcome to go back further.

Name of Customer	Amount of Sale	Commission	L/S	Source of Business

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Step 2: List Clients You Worked With But DID NOT Close – This list should not include people you are currently working rather this is a list of lost business.

Name of Customer	Source of Business	Lost Commission	Listing/Sale

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Step 3: Evaluate Source of Business – Please answer the following questions:

What was your greatest source of business?

What was your 2nd greatest source of business?

What was your 3rd greatest source of business?

What was your average commission?

What was your ratio of listings to buyers?

What can you do to increase the volume of the sources of business listed above?

What was your greatest source of lost business?

Is that source of business listed above as a good source of business?

If not, should you continue performing this source of business?

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Step 4: List of Prospecting Activities – Please list the prospecting activities you completed in the past 12 months.

Prospecting Method	# of Clients	# Closed	Total Commission	Total Expense	TC - TE

Which of the prospecting methods listed are you currently performing?

- 1.
- 2.
- 3.
- 4.
- 5.

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Step 5: Evaluate Your Listing Position – Please answer the following questions:

1. How many listing did you have in the past 12 months?
2. How many listing appointments did you have in the past 12 months?
3. How many listing sold in the past 12 months?
4. What is your average commission rate of your listings?
5. What is your average sales price to list price ratio of your listings?
6. What is your average list price?
7. What is your average days on market of your listings?
8. What are your challenges getting sellable listings?

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Step 6: Evaluate Your Strengths and Areas of Improvement –
Please answer the following questions:

1=Excellent 2=Very Good 3=Fair 4=Needs Improvement

Listing

Rating

Finding sellers	_____
Following up with potential sellers	_____
Qualifying sellers	_____
Giving an effective listing presentation	_____
Closing to get the listing	_____
Holding your commission rate	_____
Demonstrating your value	_____
Overcoming pricing objections	_____
Promoting the property	_____
Promoting your services using the property	_____

Sales

Rating

Finding buyers	_____
Evaluating buying potential	_____
Demonstrating value	_____
Following up with potential clients	_____
Showing properties	_____
Closing	_____
Amount of time spent with buyers (too much/too little?)	_____

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Step 6: Evaluate Your Strengths and Areas of Improvement –
Please answer the following questions:

1=Excellent 2=Very Good 3=Fair 4=Needs Improvement

Skills

Rating

Negotiating

Follow-up after closing

Evaluating the clients needs/motivations

Listening

Overcoming objections

Converting contacts to clients

Managing your time

Asking for referrals

What action should you take to improve your skills in the areas that need improvement?

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Step 7: Review – Please fill in the following blanks:

In order to reach your vision...

My listings to buyer ratio needs to be: _____ (i.e. 60% listings)

I need to increase my sales by _____ closed transactions

My average price point should be _____

My sales price to list price ratio should be: _____

The prospecting methods that will bring me the greatest positive impact to my business are:

I need to immediately stop doing:

I will build these skills:
