

# Accountability Game Plan:

Introductions

Beginning exercise:

Planning: Business Practices and Skills

Go through Sheet (Collect and handout)

Video: How to Create A World Class Day, with Robin Sharma

Goals and business plan:

Go through materials

Monthly, weekly, Daily goals

Make a plan, Be Accountable

With consistent daily action, the results will come

Help each other, "accountability partner"

Personal accountability sheet x2

Business Plan and Tracking Definition Document

## PLANNING – Business Practices and Skills

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**RATE YOURSELF**  
(circle your present level)

1 = Excellent  
2 = Very Good  
3 = Average

4 = Fair  
5 = Poor  
6 = Extremely Poor

Listing presentation materials	1	2	3	4	5	6
Market analysis	1	2	3	4	5	6
Pricing at market value	1	2	3	4	5	6
Listing follow-up	1	2	3	4	5	6
Overcoming objections	1	2	3	4	5	6
Obtaining full commission	1	2	3	4	5	6
Negotiating skill	1	2	3	4	5	6
Qualifying buyers	1	2	3	4	5	6
Contract writing	1	2	3	4	5	6
Cold call to appointment conversion	1	2	3	4	5	6
Open house skills	1	2	3	4	5	6
Office meeting attendance	1	2	3	4	5	6
Tour participation	1	2	3	4	5	6
Farm area contacts	1	2	3	4	5	6
Time management	1	2	3	4	5	6
Sphere of influence contacts	1	2	3	4	5	6
Computer skills	1	2	3	4	5	6
MLS computer skills	1	2	3	4	5	6
Business plan follow-through	1	2	3	4	5	6
Other: _____	1	2	3	4	5	6

## PLANNING – Goals and Business Planning

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Business Plan	
<b>INCOME:</b>	
A. Listings	\$
B. Sales	\$
C. Referrals	\$
D. Other	\$
<b>Total Income:</b>	<b>\$</b>

Monthly Unit & Dollar Volume Goal				
MONTH	LISTING	UNITS	SALES	UNITS
January	\$		\$	
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				
<b>Totals</b>	<b>\$</b>		<b>\$</b>	



## 90 MINUTES OF \*DAILY\* PROSPECTING

DATABASE CLIENTS/SPHERE				
JUST LISTED / JUST SOLD				
EXPIRED / FSBO				
GEOTARGETING NEIGHBORHOOD CALLING				
OPEN HOUSE / EVENTS				
MEDIA/ VIDEO NOTES				

### AM I WINNING THE MONTH WITH DAILY COMMITMENTS?

	WEEK 1 _____	WEEK 2 _____	WEEK 3 _____	WEEK 4 _____
PROSPECTING GOAL (HOURS / CONVERSATIONS)				
PROSPECTING ACTUAL (HOURS / PERFECT STORM ADDITIONS)				
DID YOU HIT YOUR WEEKLY GOALS?				
APPOINTMENTS THIS WEEK				

ACTIVE

PENDING

SOLD

## PLAN OF ATTACK

MONTHLY CLOSINGS	1	2	3
APPOINTMENTS NEEDED BY WEEK (4 APPTS = 1 CLOSED SALE)			
CONVERSATIONS NEEDED BY WEEK (20 CONVERSATIONS = 1 APPT)			
PROSPECTING HOURS BY WEEK			

WITH CONSISTENT DAILY ACTION, THE RESULTS WILL COME

### MONTHLY CONVERSATIONS

A large grid of 100 circles arranged in 10 rows and 10 columns, intended for tracking daily conversations. The circles are arranged in a 10x10 grid, with a horizontal line separating the top 8 rows from the bottom 2 rows.



# Personal Accountability

## 1 YEAR PLAN

### GOALS / ACTUAL

SALES VOLUME \_\_\_\_\_  
 TRANSACTIONS \_\_\_\_\_  
 INCOME \_\_\_\_\_

### GOALS for the year:

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

## ROCKS

**TWO BUSINESS commitments:**  
 Be detailed and specific\*

**WEEK ONE**

\_\_\_\_\_  
 \_\_\_\_\_

**WEEK TWO**

\_\_\_\_\_  
 \_\_\_\_\_

**WEEK THREE**

\_\_\_\_\_  
 \_\_\_\_\_

**WEEK FOUR**

\_\_\_\_\_  
 \_\_\_\_\_

**WEEK FIVE**

\_\_\_\_\_  
 \_\_\_\_\_

What am I committed to this month?  
 ROCKS for the week:

**ONE PERSONAL commitment:**  
 Be detailed and specific\*

**WEEK ONE**

\_\_\_\_\_  
 \_\_\_\_\_

**WEEK TWO**

\_\_\_\_\_  
 \_\_\_\_\_

**WEEK THREE**

\_\_\_\_\_  
 \_\_\_\_\_

**WEEK FOUR**

\_\_\_\_\_  
 \_\_\_\_\_

**WEEK FIVE**

\_\_\_\_\_  
 \_\_\_\_\_



# Personal Accountability

## 1 YEAR PLAN

### GOALS / ACTUAL

SALES VOLUME \_\_\_\_\_  
 TRANSACTIONS \_\_\_\_\_  
 INCOME \_\_\_\_\_

### GOALS for the year:

1	
2	
3	
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7	
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10	
11	
12	

## ROCKS

**TWO BUSINESS commitments:**  
 Be detailed and specific\*

<b>WEEK ONE</b>
<b>WEEK TWO</b>
<b>WEEK THREE</b>
<b>WEEK FOUR</b>
<b>WEEK FIVE</b>

What am I committed to this month?  
 ROCKS for the week:

**ONE PERSONAL commitment:**  
 Be detailed and specific\*

<b>WEEK ONE</b>
<b>WEEK TWO</b>
<b>WEEK THREE</b>
<b>WEEK FOUR</b>
<b>WEEK FIVE</b>



## **Business Plan & Tracking Definition Document**

**Reach Out** = An attempt to reach out to a lead in order to have a conversation with the end game goal of setting an appointment. This can be your first time or 30th time reaching out to a lead. You want to count every reach out attempt until the lead has become a Client (an in depth example is given below).

**Conversation** = When the lead responds to your reach out. As an example, they answer their phone, they reply to your text message, they answer their door and the main goal here is to have a conversation(s) that eventually lead to you setting an appointment. You want to count every conversation even the bad ones. As an example, you call a "Lead", they answer the phone and it ends up being the wrong number, or they tell you to stop calling them. You want to count all conversation, the good, the bad and the ugly. This will ensure your numbers are consistent.

**Appointment Set/Appointment Made** = When you have set a "Listing Presentation" and/or a "Buyer Consultation". These are with "Leads" that are not Clients and you are setting up a consultation to try to get them to become a Client. In the event the "Lead" does not show up for the appointment and you have to reset another appointment, that would count as a second appointment set. These are to only be counted with "Leads" for the initial Buyer/Listing consultation, once you have conducted the meeting, you DO NOT want to count future appointments that you set.

**Appointment Conduction** = You have set the Buyer/Listing Consultation and the "Lead" shows up, you are able to present your Buyer and/or Listing Presentation attempting to acquire them as a signed/committed Client. You DO NOT count appointment no shows, only for the actual appointments you conducted. Once they become a signed/committed Client you do not want to count any future appointments here.

**Clients** = A signed/committed (committed meaning they have signed an agreement to work with you) Buyer Broker Agreement and/or a signed Listing Agreement.

**Closing** = When you have successfully closed and recorded on your Clients Home.

IMPORTANT: I recommend that you do not count rentals in your tracking numbers. It is OK to work rentals if you choose to, but you do not want to include them into your tracker as it will throw off your number.

**Overall Tracking Example:** You receive a new lead from at Open House and it takes 13 "Reach Outs" before you have your 1st "Conversation", they are not ready to Buy/Sell yet so you continue to follow up and with your continued follow up, you "Reach Out" 15 more times and have 5 more "Conversations" to finally get an "Appointment Set". Life gets in the way, they no show the appointment. In order to reset a second appointment you have 5 more "Reach Outs" and 2 more "Conversations". This time they show up, the appointment is conducted and they decide to work with you as their Realtor, they sign a Buyer Broker. You find them a Home and end up closing on that Home.

**In this example, here is how the numbers would break down and how the should show up on your tracker:**

1 Lead (Lead Source = Open House)  
33 Total "Reach Outs"  
7 Total "Conversations"  
2 Total "Appointments Set"  
1 Total "Appointment Conduction"  
1 Total "Client"  
1 Total "Closing"