

Real Estate Business Systems – Coach Intake Form

Sales Professional: _____

Date: _____

eMail: _____

Phone: _____

Business Plan, Goals, Sources of Current Business

	Gross Commission	Net Income	Sales Volume	Units
Last Year				
YTD				
Goals				

Ave. sales price	DOM	% Listings	% Sales	List to Sale %

- ☐ What is your exit strategy? _____
- ☐ Do you have a written business plan? _____
- ☐ Do you have a business budget, P&L statement? _____
- ☐ Do you have written business and personal goals? _____
- ☐ How do you measure & track your results? _____
- ☐ Do you use the Company TC? _____ Admin Asst/TC? _____

Primary Sources of Business (%)

Past Clients/Referrals		Online Marketing	
SOI/Database		Sign Calls	
Expireds/FSBOs		Cold Calling	
Farming			
Advertising			
Networking			
Your Website			

Coach notes:

Mission, Vision, Core Values & UVP / Personal Branding

- ☐ Do you have a vision, mission and/or core values statement? _____
- ☐ Unique Value Proposition? _____
- ☐ Do you have a logo or specific personal brand? _____
- ☐ Do you have personally branded marketing material? _____
- ☐ Are you using video in your branding/marketing plan? _____

Coach notes:

Past Client/Referral Database/SOI System

- ☐ Do you have a past client/SOI list(s)? _____ How many on list? _____
- ☐ What CRM/contact management software do you use? _____
- ☐ How often do you contact your database and how? _____
- ☐ Client Care/Appreciation Program? _____
- ☐ Describe your past client/ SOI follow-up system _____

Coach notes:

Listing System

- ☐ Do you have a formal listing presentation? _____
- ☐ Do you use a leave-behind or pre-listing package? _____
- ☐ Do you have a written marketing/service commitment? _____
- ☐ How do you prospect for listings? _____
- ☐ What specific marketing do you do for your listings? _____

<input type="checkbox"/> Professional Photos	<input type="checkbox"/> Featured Listings	<input type="checkbox"/> Social Media
<input type="checkbox"/> Video Tour	<input type="checkbox"/> Your website	<input type="checkbox"/> Direct mail
<input type="checkbox"/> Single Property Website	<input type="checkbox"/> eBlasts	<input type="checkbox"/> Property Brochure
<input type="checkbox"/> Sign riders/call capture	<input type="checkbox"/> Print Advertising	<input type="checkbox"/>

Coach Notes:

Farming System

- ☐ Do you have a geographical Farm? _____
- ☐ Professional/Other: _____
- ☐ Describe your current farming activities: _____

Coach Notes:

Buyer System

- ☐ Do you conduct a Buyer's Interview? _____
- ☐ Do you have a Buyer Presentation/Consultation Guide? _____
- ☐ How do you follow-up with prospective buyers? _____

Coach Notes:

Escrow System

- ☐ Do you have an escrow/follow-up and tracking system? _____
- ☐ Client follow-up system – during the transaction? _____

Coach Notes:

Lead Generation System

- ☐ How do currently generate leads? _____

- ☐ Website? www. _____
- ☐ Paid SEO-SEM/ PPC/ Google Ads? _____
- ☐ Zillow, Trulia, Homes, Realtor.com? _____
- ☐ Market Leader or other paid lead gen? _____
- ☐ Social Media

<input type="checkbox"/> Facebook	<input type="checkbox"/> LinkedIn	<input type="checkbox"/> Twitter
<input type="checkbox"/> YouTube/Vimeo	<input type="checkbox"/> Google+	<input type="checkbox"/> Instagram
<input type="checkbox"/> Pinterest	<input type="checkbox"/>	<input type="checkbox"/>

Coach Notes:

Initial Priorities for Coaching Sessions

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Coach Notes:
