

## 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
<b>Last Year</b>				
<b>YTD</b>				
<b>Goals</b>				

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	
Expires/FSBOs		Cold Calling	
Farming			
Advertising			
Networking			
Your Website			

*Coach notes:*

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**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:*

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### Farming System

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

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*Coach Notes:*

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Buyer System
<input type="checkbox"/> Do you conduct a Buyer's Interview? _____ <input type="checkbox"/> Do you have a Buyer Presentation/Consultation Guide? _____ <input type="checkbox"/> How do you follow-up with prospective buyers? _____  <i>Coach Notes:</i> _____ _____

Escrow System
<input type="checkbox"/> Do you have an escrow/follow-up and tracking system? _____ <input type="checkbox"/> Client follow-up system – during the transaction? _____  <i>Coach Notes:</i> _____ _____

Lead Generation System		
<input type="checkbox"/> How do currently generate leads? _____ _____		
<input type="checkbox"/> Website? www. _____		
<input type="checkbox"/> Paid SEO-SEM/ PPC/ Google Ads? _____		
<input type="checkbox"/> Zillow, Trulia, Homes, Realtor.com? _____		
<input type="checkbox"/> Market Leader or other paid lead gen? _____		
<input type="checkbox"/> 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"/>
<i>Coach Notes:</i> _____ _____		

**Initial Priorities for Coaching Sessions**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_

*Coach Notes:*

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