

Business Planning: Systems Review

	In place	Needed
People Systems:		
For lead generation:		
All leads in database and updated regularly		
Contact management software implemented		
System for lead generating: markets, numbers		
System for keeping track and measuring progress—include website		
For buyers:		
Pre-first visit package		
Qualifying/interview package		
Presentation (visual)		
Internal checklists for buyer processing		
Customer satisfaction surveys implemented and measured		
For sellers:		
Pre-first visit package		
Qualifying interview package		
Presentation (visual)		
Post-listing marketing plan		
Internal checklists for listing processing		
Customer satisfaction surveys/implemented and measurement		
Long-term marketing plan for best sources of business:		
Contact management set up		
All clients in database		
Plan with budget set up		
Plan measurement set up		
Mechanical Systems		
Hardware and software to drive the systems above		
Financial Systems		
Budgets—in software program		
Profit and Loss Statements—in software program		
System for monthly analysis and adjustment		

Excerpted from The Business Planning System for the Real Estate Professional, Carla Cross Seminars, Inc. ; www.carlacross.com



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