**Business Plan Third Quarter Cumulative Review**

From Carla Cross, excerpted from [*Beyond the Basics of Business Planning*,](http://beyondthebasicsonline.com) a comprehensive online planning/training resource. One program for agents, one program for leadership

To complete, just put your cursor in the gray area and type. Save a copy for your records.

Name:  For months: **G=goal A=actual**

**¾ year goals/actuals:** Listings taken G: A:

Listings sold G: A:

Sales G: A:

**Sales Effectiveness**

**1.** *Management by the Numbers*

My analysis of my activities/results to date:

My analysis of my expenses/profitability to date:

Adjustments I need to make:

**2.** *Marketing*

My analysis of my results from specific target markets:

My analysis of my specific promotional tactics effectiveness:

Changes I need to make:

**3.** *Professional Development*

My analysis of my accomplishments:

Courses I want to take:

Resources I want to gain:

Other:

**4.** *The Big Picture*

Does my stated focus match the results of my activities and my overall business objectives for this year?

Adjustments I will make:

**5. My 3 biggest accomplishments to date:**

**6. My 3 biggest goals for the last quarter of 2016:**