



REAL ESTATE AGENT NEW YEAR CHECKUP

2020 In Review

What were your 2020 Goals?

What did you accomplish?

What did you learn?

REAL ESTATE AGENT NEW YEAR CHECKUP

Current Strategy

What lead source generated the most sales for you?:

What is your
cost per lead?

(total spent on marketing/leads
created)

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What is your
cost per client?

(total spent on marketing/clients
added)

\$.

What is your lead to
client conversion rate?

(total 2020 leads/total 2020
clients)

%

What other lead sources did you have?

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What can you improve in your acquisition to get more qualified leads?

How can you scale your process and get more leads in less time?



REAL ESTATE AGENT NEW YEAR CHECKUP

2021 Strategy

What are your 2021 Goals?

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What are your monthly projects to stay on track and hit your goals?

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What are your key numbers and stats to let you know if you're on track with your goals? your projects?