

# Evaluation and Analysis

For

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(Name)

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(Address)

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(Office)

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(Home Phone)

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(Office Phone)

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(Cell Phone)

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(Fax Line)

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(E-Mail Address)

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(Birth Date)

**You understand that this meeting is to allow us to find ways to help understand one another and to help build business. I believe in building relationships and in my \_\_\_\_ years in the real estate business I have gotten a lot of satisfaction out of helping agents reach the next level in their business and it doesn't matter whether they are working for me or not. In our business we are colleagues as well as competitors, so what I can do to help you will come back to my office and me in good relationships in the future. What we talk about is strictly confidential and is strictly between you and I. So in order for us to determine whether or not we can build a relationship, I need to ask you a few questions. Some may feel personal or even make you a little uncomfortable. Is that going to be OK?**





**4. TELL ME WHAT YOUR IDEAL REAL ESTATE OFFICE WOULD LOOK LIKE?  
What does that mean to you? Tell me more about that? What else?**

**5. TELL ME WHAT YOUR RELATIONSHIP WITH YOUR MANAGER IS LIKE?  
What does your company or manager mean to you?**

**6. TELL ME WHY YOU LIKE THE \_\_\_\_\_ REAL ESTATE OFFICE? What  
are the main things you like about it?**



**7. TELL ME ABOUT YOUR BUSINESS PLAN? Do you follow it? Do you keep it up to date? How often do you review it?**

**8. TELL ME ABOUT YOUR MARKETING PLAN? How does it help you generate business? How much business does it help you generate? Anything else?**

**9. TELL ME, IS THERE ANYTHING YOU ARE CURRENTLY CONCERNED ABOUT?**



**10. TELL ME THE ONE THING YOU WOULD LIKE TO ADD, TO THE WAY YOU DO YOUR BUSINESS?**

**11. TELL ME ABOUT WHAT YOU SPEND ON PERSONAL MARKETING? How do you track the results? How much do you spend? What percentage of your income is that?**

**12. TELL ME HOW YOU FEEL ABOUT COMPANY SPONSORED TRAINING?**



**13. GIVE ME A SENSE OF WHAT YOU THINK TODAY'S SALES ASSOCIATE WANTS FROM THEIR COMPANY?**

**14. WHAT DO YOU THINK FUTURE AGENTS WILL WANT?**

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**This has been a very informative meeting for me. To get us to the next step, I would like to meet with you, again to discuss your business and analyze it with you. In order to do this there are a few simple questions you will need to think about and bring back the answers to our next meeting.**

**Can we go over them briefly and then set up our next get together?**



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1992, 1995, 2000, 2003, 2004, 2005, 2007

# Beginning Business Analysis for

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1. Where would you like your business to be one year from now?

Three years from now?

Five years from now?

2. List everything you think you will need to get there.

3. If you accomplish your goals, what would it mean to you and your family?

4. What one thing, from the list of what you need is really critical to help you accomplish your goals?

5. May I have your permission to download your annual production numbers from the MLS in order to assist you to analyze your business? What is your MLS Number?

**THIS SURVEY IS HELD STRICTLY CONFIDENTIAL BY**

**OF \_\_\_\_\_**

**AND WILL NOT BE USED FOR BUSINESS ADVANTAGE NOR REVEALED TO ANY OTHER PERSON WITHOUT THE CONSENT OF THE PERSON, WHOSE NAME APPEARS AT THE TOP OF THIS SURVEY.**

\_\_\_\_\_  
**DATE** \_\_\_\_\_

