



QUANTUM'S MASTERS™

BUSINESS

PLAN

WORKSHEETS

“A YEAR WITHOUT CLOSED LOOP THINKING.”

DOUG YEAMAN



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Sources of Business

Fiscal/Calendar Year ____

BUYER CONTROLLED SALES	
Property Address	Source of Business

Enter totals for the following categories:

From Quantum Home Tour™ Sources:

Buyers from Quantum Home Tour™	_____	Listings from Quantum Home Tour™	_____
Jelly Bean Jar™	_____	Jelly Bean Jar™	_____
QHT FSBO's	_____	Referrals	_____
QHT Expireds	_____		

From Non Quantum Home Tour™ Sources:

Jelly Bean Jar™ FSBO*	_____	Broker referral	_____
Relocation Referral	_____	Past Client*	_____
Floor time	_____	Advertising	_____
Expireds*	_____	Relative*	_____
Internet*	_____	Friend*	_____
		Geo Farm	_____

* Non Jelly Bean Jar™ Business

Identify areas for possible improvement:



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Business Expenses (Marketing)

Fiscal/Calendar Year _____

	Past Year	Plan Year
1. Newspaper Ads	_____	_____
2. Magazine Ads	_____	_____
3. Yellow Pages Ads	_____	_____
4. TV/Radio	_____	_____
5. Direct Mail	_____	_____
6. Church/Club Directories	_____	_____
7. Promotional Flyers	_____	_____
8. Postage	_____	_____
9. Yard Sign/Riders, etc.	_____	_____
10. Photography	_____	_____
11. CB Marketing Tools	_____	_____
12. Personalized Marketing Tools	_____	_____
13. Quantum Home Tour™	_____	_____
14. Other	_____	_____
TOTAL MARKETING EXPENSES:		



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Business Expenses Analysis

Fiscal/Calendar Year _____

Total Gross Commissions 1. _____

Expenses:

Marketing: _____ (1a)

Other than marketing _____

Total: 2. _____

Profit or (Loss) 3.
(Subtract Line 2 from Line 1)

What percent of every dollar is invested back into your business?
(Line 2 ÷ Line 1) 4. _____

What percent of every dollar is invested in personal marketing?
(Line 1A ÷ Line 1) 5. _____

After completing this analysis, identify your opportunities for greater effectiveness:



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Production Analysis of Previous Year

Fiscal/Calendar Year _____

1. **Total Commissions Earned (gross)** _____

LISTING SIDE

2. Number of Listings Taken (L/T) _____

3. Number of Listings Sold (L/S) _____

4. % of Listings Sold to Listings Taken (line 3 ÷ line 2) _____

5. Total Volume of Listings Sold (add sales prices of all L/S) _____

6. Average Sales Price of Listings Sold (line 5 ÷ line 3) _____

SELLING SIDE

7. Number of Buyer Controlled Sales (BCS) _____

8. Total Volume of BCS (add sales prices of all closed BCS) _____

9. Average Sales Price of BCS (line 8 ÷ line 7) _____

UNIT TOTALS

10. Number of Listings Sold (line 3 above) _____

11. Number of Buyer Controlled Sales (line 7 above) _____

12. Total Closed Units _____

AVERAGE INCOME PER UNIT

13. Total Commissions Earned (line 1 above) _____

14. Total Closed Units (line 12 above) _____

15. Average Commission Earned Per Unit (line 13 ÷ line 14) _____

16. % of Business from Listings Sold (line 3 ÷ line 14) _____

17. % of Business from Buyer Controlled Sales (line 7 ÷ line 14) _____



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Productivity Plan for Next Year

Fiscal/Calendar Year _____

<u>Year**</u>	<u>Past Year*</u>	<u>Plan</u>
1. Total Commissions <i>(Multiply past year by minimum of 125% or enter desired figure)</i>	_____	_____
2. Percentage of increase <i>(Take difference between past year and plan year and divide by past year income)</i>	_____	_____
3. Total closed units <i>(Plan Year Line 1 ÷ past year average commission)</i>	_____	_____
4. # of Listings Sold <i>(Production Analysis line 16 × Plan Year line 3)</i>	_____	_____
5. # of Listings Taken <i>(Plan Year line 4 ÷ Production Analysis line 4)</i>	_____	_____
6. # Closed Buyer controlled sales <i>(Plan Year line 3 × Production Analysis line 17)‘</i>	_____	_____
7. # Listings needed each month <i>(Plan Year Line 5 ÷ 12)</i>	_____	_____
8. # Buyer Controlled Sales needed each month <i>(Plan Year Line 7 ÷ 12)</i>	_____	_____

* Enter past year figures on lines 1, 3, 4, 5, 6 only

** Follow *italized* computation instructions to determine plan year figures

