

SUBJECT	Masters Annual Business Plan	Page 1 of 11	Masters Pre-Business Plan Questionnaire.p65	DATE
ITEM	CONTENT			NOTES
I. Analysis				
1. How much dollar income did you make in the last 12 months?	This analysis starts from _____ (Mo.) 20__ as the reference date.			
	\$ _____			
2. How many transactions did you open in the last 12 months?	# _____			
	\$ _____			
3. How much in gross dollar (\$) commission closed to you did you receive?	\$ _____			
	\$ _____			
4. How much in referral income (\$) did you receive?	\$ _____			
	\$ _____			
5. How much in other business related income did you receive?	\$ _____			
	\$ _____			
6. Calculate the Average value per transaction to you. (total income ÷ total # of transactions).	\$ _____			
	\$ _____			
7. Calculate or estimate as accurately				



SUBJECT	Masters Annual Business Plan	Page 2 of 11	Masters Pre-Business Plan Questionnaire.p65	DATE																
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as possible the total number of transaction that fell out.	# _____																			
8. Calculate or estimate as accuarately as possible the total number of clients worked with to close these transactions. (Not deals fell through, but clients not buying + c l i e n t s buying=total)	# _____																			
9. List and identify all sources of marketing expenses related to your business.	<table> <thead> <tr> <th>Name:</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>\$ _____</td> </tr> <tr> <td>Total</td> <td>\$ _____</td> </tr> </tbody> </table>			Name:	Amount	_____	\$ _____	_____	\$ _____	_____	\$ _____	_____	\$ _____	_____	\$ _____	_____	\$ _____	Total	\$ _____	
Name:	Amount																			
_____	\$ _____																			
_____	\$ _____																			
_____	\$ _____																			
_____	\$ _____																			
_____	\$ _____																			
_____	\$ _____																			
Total	\$ _____																			
10. Calculate the Average marketing cost of each transaction,	\$ _____																			



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11. Calculate or estimate as accurately as possible the total hours spent managing and developing the marketing program.				
	# _____			
12. Determine your hourly billing rate. (this is the total amount of dollars generated per average transaction divided by the total average hours spent by you personally working with the client; not the prospecting or admin. time).				
	\$ _____			
13. Calculate the costs of those marketing hours by multiplying total hours x your personal hourly billing rate.				
	\$ _____			

