

ITEM	CONTENT	NOTES
<p><b>I. Analysis</b></p> <p>1. How much dollar income did you make in the last 12 months?</p> <p>2. How many transactions did you open in the last 12 months?</p> <p>3. How much in gross dollar (\$) commission closed to you did you receive?</p> <p>4. How much in referral income (\$) did you receive?</p> <p>5. How much in other business related income did you receive?</p> <p>6. Calculate the Average value per transaction to you. (total income ÷ total # of transactions).</p> <p>7. Calculate or estimate as accurately</p>	<p>This analysis starts from _____ (Mo.) 19__ as the reference date.</p> <p>\$ _____</p> <p># _____</p> <p>\$ _____</p> <p>\$ _____</p> <p>\$ _____</p> <p>\$ _____</p>	



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<p>as possible the total number of transaction that fell out.</p> <p>8. Calculate or estimate as accurately 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)</p> <p>9. List and identify all sources of marketing expenses related to your business.</p> <p>10. Calculate the Average marketing cost of each transaction,</p>	<p># _____</p> <p># _____</p> <table style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Name:</th> <th style="text-align: left;">Amount</th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>\$ _____</td> </tr> <tr> <td>_____</td> <td>\$ _____</td> </tr> <tr> <td>_____</td> <td>\$ _____</td> </tr> <tr> <td>_____</td> <td>\$ _____</td> </tr> <tr> <td>_____</td> <td>\$ _____</td> </tr> <tr> <td>_____</td> <td>\$ _____</td> </tr> <tr> <td style="text-align: right;">Total</td> <td>\$ _____</td> </tr> </tbody> </table> <p>\$ _____</p>	Name:	Amount	_____	\$ _____	_____	\$ _____	_____	\$ _____	_____	\$ _____	_____	\$ _____	_____	\$ _____	Total	\$ _____	
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<p>11. Calculate or estimate as accurately as possible the total hours spent managing and developing the marketing program.</p>	<p># _____</p>	
<p>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).</p>	<p>\$ _____</p>	
<p>13. Calculate the costs of those marketing hours by multiplying total hours × your personal hourly billing rate.</p>	<p>\$ _____</p>	

