



QUANTUM'S MASTERS™

BUSINESS

PLAN

WORKSHEETS

"A YEAR WITHOUT CLOSED LOOP THINKING."

DOUG YEAMAN

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QUANTUM
MANAGEMENT
SYSTEMS
(435) 649-3998
www.quantum-management.com

QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Closed Transactions

Fiscal/Calendar Year 2004

Property Address	B.C.S. ✓	L.S. ✓	Sales Price	Commission Earned
5454 Big Sky Lane		✓	999,000	19,979 PC
5523 VISTA DEL RIO	✓		459,900	8982. COI
583 S. Hibiscus Way		✓	800,000	12,656 COI
959 S. LAMAR LN		✓	940,000	11,106 COI
8351 E. STARCREST	✓		745,000	12,261 COI
983 S. SILVER STAR		✓	740,000	9989. COI
1236 CORNERSTONE		✓	492,000	9636 P.C.
29105 MANGO ST		✓	432,000	7188 COI
2890 W. SEGERSTRON		✓	505000	9902. OH
TOTALS				

1. # Closed Transactions _____
2. Total volume closed transactions (add sales prices) _____
3. Average sales price (line 2 ÷ line 1) _____
4. Total commissions earned _____
5. Average commission (line 4 ÷ 1) _____

* If you sold your own listing, count each side as 1 transaction



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Closed Transactions

Fiscal/Calendar Year _____

Property Address	B.C.S. ✓	L.S. ✓	Sales Price	Commission Earned
1407 E. Garcia Pl	✓		840,000	20,143 OK
909 Gehrig		✓	710,000	11,187 CoI
1097 S. Roxford		✓	950,000	14,716 FARM
11314 Stuebner		✓	520,000	10,208 CoI
981 Scripps Ct		✓	881,000	17,246 CoI
1837 Allegheny		✓	690,000	10,860 CoI
8322 E. Quiet Canyon		✓	785,000	15,293 CoI
5320 Silver Canyon	✓		416,900	13,607 CoI
15443 Turquoise		✓	699,900	12,245 PC
TOTALS				

1. # Closed Transactions _____
2. Total volume closed transactions (add sales prices) _____
3. Average sales price (line 2 ÷ line 1) _____
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* If you sold your own listing, count each side as 1 transaction



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Closed Transactions

Fiscal/Calendar Year _____

Property Address	B.C.S. ✓	L.S. ✓	Sales Price	Commission Earned
1407 E. GARCIA Pl	✓		840,000	20,163 OH
909 GARRIG		✓	710,000	11,187 CoI
1097 S. REXFORD		✓	950,000	14,716 FARM
11314 STUDEBAKER		✓	520,000	10,208 CoI
981 SCRIPPS Ct		✓	881,000	17,246 CoI
1837 ALLEGHENY		✓	690,000	10,860 CoI
8322 E. QUIET Canyon		✓	795,000	15,293 CoI
5320 SILVER CANYON	✓		416,900	13,607 CoI
15443 TURQUOISE		✓	699,900	12,245 PL
TOTALS				

1. # Closed Transactions _____
2. Total volume closed transactions (add sales prices) _____
3. Average sales price (line 2 ÷ line 1) _____
4. Total commissions earned _____
5. Average commission (line 4 ÷ 1) _____

* If you sold your own listing, count each side as 1 transaction



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Closed Transactions

Fiscal/Calendar Year _____

Property Address	B.C.S. ✓	L.S. ✓	Sales Price	Commission Earned
517 S. BIRCHTREE		✓	830,000	16,532. FARM
174 N Paseo Rio Mar		✓	657,500	13,013 CoI
1919 W CHATEAU		✓	570,000	7739 CoI
8663 WINDSONG		✓	815,000	8438. RL
TOTALS	4	18	15,478,200	

1. # Closed Transactions 22
2. Total volume closed transactions (add sales prices) 15,478,200
3. Average sales price (line 2 ÷ line 1) 703,554
4. Total commissions earned 272,946
5. Average commission (line 4 ÷ line 1) 12,406

* If you sold your own listing, count each side as 1 transaction



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Listings Taken

Fiscal/Calendar Year 2006

Property Address	Date Sold	Date Expired or Taken off Mar-	Reason Didn't Sell
5454 BIG SKY LANE	3/14	3/28	
683 S. HANSCUS	3/31	4/7	
959 E LADAN	3/31	4/21	
988 S. SILVER STAR	3/31	6/27	
1236 CORNERSTONE	3/31	5/7	
29105 MANGO	4/28	5/21	
2828 W. SÖBERSTRÖM	5/19	5/30	
909 GEHRLE	6/5	6/5	
1097 S. REXFORD	5/19	6/22	
11314 STUDEBAKER	6/8	6/30	
981 SCRIPPS	6/5	7/12	
1837 ALLEGHENY	6/13	7/17	
8322 QUIET CANYON	6/27	7/19	

1. # Listings Taken _____
2. # Listings Sold _____
3. % of Listings Sold (line 2 + line 1) _____



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Listings Taken

Fiscal/Calendar Year _____

Property Address	Date Sold	Date Expired or Taken off Mar-	Reason Didn't Sell
15463 TURQUOISE	7/29 ^{8/11}		
517 S. BEECHTREE	7/23 ^{8/30}		
174 N. PASO RIO MORANO	10/3 ^{10/12}		
1919 W CHATEAU	10/9 ^{10/28}		
8663 WINDSONG	10/25 ^{11/9}		
967 BARTON			ACTIVE
8111 E MARBLEHEAD			ACTIVE
8210 E MARBLEHEAD			ACTIVE
573 S. MORNINGSTAR			ACTIVE
371 S. LARKWOOD			ACTIVE
22 LE VANTO			ACTIVE

1. # Listings Taken _____
2. # Listings Sold _____
3. % of Listings Sold (line 2 ÷ line 1) _____



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Listings Taken

Fiscal/Calendar Year _____

Property Address	Date Sold	Date Expired or Taken off Mar-	Reason Didn't Sell
1003 TAYLOR		10/18/2006	DIVORCE - RECONCILED
8870 WILEY		9/12/2006	TOO HIGH
655 IRONHORSE		11/12/2006	WAIT UNTIL SPRINT
2593 N AVAION		1/8/2006	TOO HIGH - DIVORCE
1054 MOUNTAIN		10/31/2006	DIVORCE TOO HIGH
8487 DANNY BOND		8/13/2006	TOO HIGH SELLER ASK

- 1. # Listings Taken 30
- 2. # Listings Sold 18
- 3. % of Listings Sold (line 2 + line 1) 60



QUANTUM'S MASTERTM BUSINESS ANALYSIS

Sources of Business

Fiscal/Calendar Year _____

BUYER CONTROLLED SALES	
Property Address	Source of Business
5523 VISTA DEL RIO	SELLER
9351 E STARCREST	SELLER
1407 E. GARZIA	SELLER
5320 SILVER CANYON	COF

Enter totals for the following categories:

From Quantum Home TourTM Sources:

Buyers from Quantum Home TourTM _____
 Jelly Bean JarTM _____
 QHT FSBO's _____
 QHT Expires _____

Listings from Quantum Home TourTM _____
 Jelly Bean JarTM _____
 Referrals _____

From Prestige Home TourTM Sources:

Buyers from Quantum Home TourTM _____
 Jelly Bean JarTM _____
 QHT FSBO's _____
 QHT Expires _____

Listings from Quantum Home TourTM _____
 Jelly Bean JarTM _____
 Referrals _____

From Non Quantum Home TourTM Sources:

Geo Farm _____
 FSBO* _____
 Relocation Referral _____
 Floor time _____
 Expires* _____
 Internet* _____

Broker referral _____
 Past Client* _____
 Advertising _____
 Relative* _____
 Friend* _____
 Other _____

* Non Jelly Bean JarTM Business
 Identify areas for possible improvement: _____



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Sources of Business

Fiscal/Calendar Year ____

BUYER CONTROLLED SALES	
Property Address	Source of Business
5523 VISTA DEL RIO	SELLER
8351 E. STARBUCK	SELLER
1407 E. GARCIA	SELLER
5320 SILVER CANYON	COF

Enter totals for the following categories:

Jelly Bean Jar	_____	Broker referral	_____
Open House	_____	Relocation Referral	_____
FSBO	_____	Past Client	2
Floor time	_____	Relative	_____
Expireds	_____	Friend	1
Other	_____	Other	_____

Identify areas for possible improvement:



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Business Expenses (Marketing)

Fiscal/Calendar Year 2006

	Past Year	Plan Year
1. Newspaper Ads	5000	6000
2. Magazine Ads <i>Business</i>	2400	1000
3. Yellow Pages Ads <i>Billboards</i>	1000	—
4. TV/Radio <i>Internet</i>	740	800
5. Direct Mail	9700	12000
6. Church/Club Directories		
7. Promotional Flyers	11300	15000
8. Postage	5600	8000
9. Yard Sign/Riders, etc.	1500	1000
10. Photography		
11. CB Marketing Tools <i>Banner</i>	2400	—
12. Personalized Marketing Tools	8500	5000
13. Quantum Home Tour™		
14. Other <i>SEABER</i>	6700	5000
TOTAL MARKETING EXPENSES:	54740	53800



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Other Than Marketing

Fiscal/Calendar Year 2006

	Past Year	Plan Year
1. Auto (lease or loan payment)	4200	4200
2. Auto Expense (gas, maintenance)	2500	2500
3. Insurance (Auto)	600	600
4. Insurance (E&O)	500	500
5. Dues (Clubs, Organization, etc.)		
6. MLS Membership	492.5	500
7. Professional Books/Tapes		
8. Phone	2476	2500
9. Office Supplies	4220	5000
10. Equipment (FAX, Software, Copy Machine, Pager)	500	1500
11. Computer (Hardware)		
12. Seminars	2600	2500
13. Lock Boxes		
14. Professional Services (Accounting, Attorney, etc.) <i>January</i>	2400	1000
15. Secretarial/Personal Assistant Services	13732	20,000
16. Sales Conferences (CB Annual Conference, NAR, CAR)		
17. Licenses		
18. Gifts	1448	2000
19. Business Periodicals (Magazines)		
20. Entertainment	2500	2500
21. Other <i>Referral Fees</i>	13000	20,000
22. Other		
TOTAL BUSINESS EXPENSES:	51388	66,300



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Business Expenses Analysis

Fiscal/Calendar Year 2006

Total Gross Commissions 1. 272,946

Expenses:

Marketing: 54,740 (1a)

Other than marketing 51,388

Total: 2. 106,128

Profit or (Loss) 3. 166,818
(Subtract Line 2 from Line 1)

What percent of every dollar is invested back into your business?
(Line 2 + Line 1) 4. 39

What percent of every dollar is invested in personal marketing?
(Line 1A + Line 1) 5. 20

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



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Production Analysis of Previous Year

Fiscal/Calendar Year 2006

1. Total Commissions Earned (gross) 272,946

LISTINGSIDE

2. Number of Listings Taken (L/T) 30
3. Number of Listings Sold (L/S) 18
4. % of Listings Sold to Listings Taken (line 3 ÷ line 2) 60
5. Total Volume of Listings Sold (add sales prices of all L/S) 13,016,400
6. Average Sales Price of Listings Sold (line 5 ÷ line 3) 723,133

SELLING SIDE

7. Number of Buyer Controlled Sales (BCS) 4
8. Total Volume of BCS (add sales prices of all closed BCS) 2,461,800
9. Average Sales Price of BCS (line 8 ÷ line 7) 615,450

UNIT TOTALS

10. Number of Listings Sold (line 3 above) 18
11. Number of Buyer Controlled Sales (line 7 above) 4
12. Total Closed Units 22

AVERAGE INCOME PER UNIT

13. Total Commissions Earned (line 1 above) 272,946
14. Total Closed Units (line 12 above) 22
15. Average Commission Earned Per Unit (line 13 ÷ line 14) 12,406
16. % of Business from Listings Sold (line 3 ÷ line 14) 82%
17. % of Business from Buyer Controlled Sales (line 7 ÷ line 14) 18%



QUANTUM'S MASTERS™ BUSINESS ANALYSIS

Productivity Plan for Next Year

Fiscal/Calendar Year 2006

<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>	<u>272946</u>	<u>400,000</u>
2. Percentage of increase <i>(Take difference between past year and plan year and divide by past year income)</i>	<u> </u>	<u>46</u>
3. Total closed units <i>(Plan Year Line 1 ÷ past year average commission)</i>	<u>22</u>	<u>32</u>
4. # of Listings Sold <i>(Production Analysis line 16 × Plan Year line 3)</i>	<u>18</u>	<u>26</u>
5. # of Listings Taken <i>(Plan Year line 4 ÷ Production Analysis line 4)</i>	<u>30</u>	<u>43</u>
6. # Closed Buyer controlled sales <i>(Plan Year line 3 × Production Analysis line 17)'</i>	<u>4</u>	<u>6</u>
7. # Listings needed each month <i>(Plan Year Line 5 ÷ 12)</i>	<u> </u>	<u>3.6</u>
8. # Buyer Controlled Sales needed each month <i>(Plan Year Line 7 ÷ 12)</i>	<u> </u>	<u>.5</u>

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

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

