

# AGENT PERFORMANCE REVIEW

Name: \_\_\_\_\_

## Current Year

Unit: \_\_\_\_\_

Volume: \_\_\_\_\_

Net Income goals: \_\_\_\_\_

## I am clear on the strategies I need to execute to meet my goals:

- ☐ Crystal clear
- ☐ I might need a refresher. I am struggling
- ☐ I know what to do, I am just not doing it
- ☐ SOS - I have no idea what I am doing!

## How did I feel about my progress for the month of \_\_\_\_\_:

- ☐ GREEN LIGHT: Full speed ahead. I am on track & don't need help with anything at this time.
- ☐ YELLOW LIGHT: I'm a little stuck. I'm not on track, I need to revise my activities
- ☐ RED LIGHT: HELP! I need to course correct but I don't know how to get back on track.

## The main thing I'm working on mastering right now in my professional life is:

## My 3 major goals and focus for next month are:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## I believe additional education or guidance on the following would be beneficial:

**Based on your goals, mark all that apply:**

- ☐ I know ☐ I do not know how many appointments I need to be going on each week/month.
- ☐ I know ☐ I do not know how many HOT (willing, ready, and able to buy or sell in the next 90 days) leads I should have in my database at all times.
- ☐ I know ☐ I do not know how many calls to make weekly to turn over my database quarterly
- ☐ I know ☐ I do not know the other lead generation tactics to engage
- ☐ I am committed to best practices for lead generation, learning & engagement with my clients.
- ☐ I am able to give my professional goals 100% focus.
- ☐ I have a personal hurdle preventing me from giving my professional goals 100% at this time.

**From my perspective, the person who stood out to me on the team as exemplifying our values of GROWTH (grit, results, only leaders, wealth, teamwork, humility) recently:**

**As we move into the next quarter, what client or team events would you like to see?**

**As we move into the next quarter, what skills would you like to improve?**

**As a company, what are we doing very well?**

**As a company, what can we improve on ?**

**The main goal I'm working on in my personal life is:**