Tracking Your Business

What Are the Vital Signs?



WHY TRACK?

Don't Bother To Plan If You Don't Intend to Track!

- **Most Of Us Have An Unlimited Capacity For Self Deception!**
- **You Must Know Your <u>REAL</u> Numbers In Order To Plan Properly.**
- **Visual Representation Of Your Results—Insight!**
- **GPS For Your Business Goals**
  - ***"If you don't know where you're going you'll end up someplace else" - Yogi Berra***
- **What You Pay Attention To Expands!**
- **Get you from point "A" (aspiration) to Point "R" (reality)!**
- **Get "On Purpose"**
- **"Drive" Your Business vs. "Ride" Your Business.**

"If you can't measure it, you can't manage it. If you can't manage it, you can't improve it."

ANYTHING YOU TRACK/WATCH wILL GROW!

- **Clear Goal**
- **Measure Your Progress**
- **Moving Towards Your Goal??**
- **Moving Away From Your Goal??**
- **How Fast Are You Moving??**

e.g.

Track Performance

Improve Performance

Pay Performance!

Baseball Batting Stats

1. Batting Average
2. On-base %
3. Slugging %
4. OPS
5. Games
6. At Bats
7. Plate Appearances
8. Runs
9. Hits
10. Total Bases
11. Doubles
12. Triples
13. Home Runs
14. RBI
15. Bases on Balls
16. Strikeouts
17. Stolen Bases
18. Singles
19. Adjusted OPS+
20. Runs Created
21. Adjusted Batting Runs
22. Batting Wins
23. Extra-Base Hits
24. Times on Base
25. Offensive Win%
26. Hit By Pitch
27. Sac. Hits
28. Sac. Flies
29. Intentional Walks
30. Grounded into Double Plays
31. Caught Stealing
32. Power/Speed Number
33. At Bats per Strikeout
34. At Bats per Home Run
35. Outs

Average Salary: $2,923,240!

What We Track

- **Volume For The Month And YTD.**
- **Gross Commission Income (GCI); Month And YTD**
- **Net Commission Income (NCI); Month And YTD**
- **Listings; Active And Pending**
- **Sales Pending**
- **Avg. Sale Price**
- **Avg. Transaction Fee**
- **Avg. GCI**
- **Avg. NCI**
- **Gross Commission %**
- **Net Commission %**
- **Avg. # Transactions Booked/Month**
- **Avg. DOM (Days On Market)**
- **# Of Sales Per Day On Average**
- **# Listings Taken Per Month**
- **# Listings Sold Per Month**
- **# Sales Booked Per Month**
- **# Leads Received Per Month and Our Conversion %**
- **Commissions By Month**
- **Transaction Source**
- **Profit And Loss Statement (QuickBooks)**

COMMISSIONS PAID

1988

CUSTOMER	ADDRESS	L/S/R	DATE SETTLED	DATE PAID	PROD. $$	TOTAL PROD. $$	COMM. $$	TOTAL COMM. $$
Rosborough	15813 White Rock Rd.	S	1-12-88	1-12-88	204,950	204,950	6148.50	6,148.50
Rosborough	Springfield, VA. 25%	Listing Referral	2-88	2-88	—	—	1,124.25	7,272.75
Rogers	20037 Doolittle St.	R	2-25-88	~~3-11-88~~ 2-88	—	—	746.87	8,019.62
Bowser	442 Girard St. #442 20% ref fee pd.	L	3-4-88	3-11-88	41,500	246,450	996.00	9,015.62
Schmidt	16613 Cutlass Dr. 20% ref fee pd.	S	3-11-88	3-11-88	260,000	506,450	6240.00	15,255.62
Wolff	8609 Lime Kiln Ct.	L	4-29-88	4-29-88	181,350	687,800	5440.50	20,696.12
Jones	20111 Halethorpe La	L	5-13-88	5-17-88	78,500	766,300	2355. -	23,051.12
Berg	20111 Halethorpe La.	S	5-13-88	5-17-88	78,500	844,800	2355	25,406.12
Offutt	18901 Blue Heron La.	L	6-10-88	6-13-88	167,000	1,011,800	5010.	30,416.12
Grapes	13708 Charity Ct.	S	6-10-88	6-14-88	284,250	1,296,050	8452.50	38,868.62
Wolff	18621 Pier Pt. Pl.	L	6-10-88	6-14-88	91,900	1,387,950	2757. -	41,625.62
Chapman	13 Bertana Way	S	6-13-88	6-15-88	218,000	1,605,950	6,540. -	48,165.62
Frame	20628 Highland Hall Dr. 20% ref fee	S	6-15-88	6-22-88	171,000	1,776,950	~~5,720~~ 4104	52,269.62
Offutt	12625 War Admiral Way	S	6-22-88	6-23-88	260,000	2,036,950	7,800.	60,069.62
Offutt	18634 Sage Way 5% listing	L	6-22-88	6-24-88	72,050	2,108,950	1,441	61,510.62
Rosborough	15813 White Rock Rd.	L	6-28-88	7-5-88	233,000	2,341,950	6990	68,500.62
Jones	19 Drumcastle Ct.	S	6-30-88	7-5-88	112,645	2,454,595	3379.35	71,879.97
Lenne	18304 Timko Lane	S	7-24-88	7-28-88	77,500	2,532,090	2325.00	74,204.97
Savage	Pleasanton CA	Sale R	7-88	7-88	—	—	22700	76,478.97

Contact Information

ID# 1034

Contact: Rhan Yi

Transaction Type: L

Status: Settled

Address Heading: Rhan Yi

Transaction Source: Open House

CAP Status: ☐ Paid?

Enter Date: 2/13/2008

Mod. Date: 4/25/2008

Listing Information

Address: 33 A Golden Ash Way

Trans. Zip: 20878

Trans. City: Gaithersburg

List Date: 2/7/2008

MLS Date: 3/7/2008

MLS#: 6686769

Exp. Date: 8/22/2008

List Price: $384,900

Neighborhood: Lakelands

Settlement Information

Referred By:

☐ DOM Override

Enter Date: 2/13/2008

Case #: 13872

Title Company: Paragon Title

Lender:

Loan Amount | Term | Interest Rate

2nd Loan Amount | Loan Type | 2nd Loan Rate

Comm. Rate: 3.00% | BA Percent | Referral Rate

TPF: $595.00 | LA Comm. Rate: 30.00% | Referral Agent Name

LA1% 75% $2,565.00 LA2% 25% $855.00

DOM: 17

U/C Date: 3/24/2008

Settlement Date: 4/25/2008

Settlement Time: 11:00 AM

Sale Price: $380,000.00

Commission Price: $380,000.00

Same As SP

Bonus/Royalty Calc.

Royalty:

BA Bonus Rate:

MC&A Associate

☑ Mary ☐ Laura

☐ Shari ☐ David

☐ Charlotte ☐ Katherine

Commission Calculation

Gross Commission $11,400.00 + Royalty + TPF $595.00 - Referral Fee $0.00 = GCI $11,995.00 + Comm. Adjust.

+ BA Comm Adjust $0.00 - BA Comm $0.00 - Office Trans Fee - TL Bonus $0.00 - LA Commission $3,420.00 = NCI $8,575.00

FYI ONLY: Net Bonus $0.00

*Notes, if any, are below!

Notes - Format: Date (00/00/00), Initials, Comments

Active & Pending Listing Report

Type	Status		Address	MLS#	Exp. Date	List Date	MLS Date	U/C Date	Settle Date	DOM	List Price	TPF	Com	Ref.	Seller	Source	
F	Future	13887	15312 Masonwood Drive			4/7/2008				0	$1,495,000	$595	5.000%		Robert Ryan	Our Seller	MC
F	Future	13886	16420 Montecrest	MC67360		4/15/2008	4/21/2008			0	$325,900		3.000%		Paul Gadoci	RAD RE Gui	LY
Category Total	Future	2	Avg. List Price	$910,450						0	$1,820,900		4.000%				
Total for Type:	**F**	**2**									**$1,820,900**		4.00%				
L	Active	13888	110 Chevy Chase Street	6736011	10/15/200	4/15/2008	4/21/2008			6	$325,900	$595	3.000%		Rebecca Haven	Farm	MC
L	Active	13858	232 Main Street	6621400	6/18/2008	12/21/2007	12/28/2007			121	$1,190,000	$0	2.000%		Leslie Tripp	Pers Cont/P	MC
L	Active	13875	408 Ridgepoint Place #38	6698731	9/13/2008	3/14/2008	3/21/2008			37	$329,950	$595	3.000%		Peggy Perry	Pers Cont/P	MC
L	Active	13867	12407 Rousseau Terrace	6709655	10/1/2008	1/14/2008	4/1/2008			26	$699,000	$0	2.500%		James Krejci	Farm	CG
L	Active	13881	5612 Silver Oak Court	6709609	9/18/2008	4/1/2008	4/1/2008			26	$1,189,000	$0	2.500%		Brian & Karen Gall	Bought Our	MC
L	Active	13870	227 Thaxton Street	6706816	8/1/2008	2/1/2008	3/30/2008			28	$869,000	$595	3.000%		Tim & June Bradley	Farm	MC
L	Active	13878	203 Thaxton Street	6729424	9/29/2008	4/2/2008	4/14/2008			13	$1,100,000	$595	2.500%		Jeffrey Boggs	Internet	CG
Category Total	Active	7	Avg. List Price	$814,693						37	$5,702,850		2.643%				
L	Pending	13869	24304 Flamingo Terrace	6656428	7/31/2008	1/30/2008	2/8/2008	4/6/2008	5/30/2008	58	$384,900	$595	3.000%	25%	Steven Penso	Referral-Age	MC
L	Pending	13859	577 Inspiration Lane	6644160	6/22/2008	12/30/2007	1/25/2008	4/11/2008	5/9/2008	77	$749,000	$0	2.500%		Greg Lomax	Internet	MC
Category Total	Pending	2	Avg. List Price	$566,950						68	$1,133,900		2.750%				
Total for Type:	**L**	**9**									**$6,836,750**		2.67%				
Count of Active & Pending Listings:		**11**	**Overall Average:**	***$787,059***							**$8,657,650**						

This Report Includes Settlements for the following date ranges:

From: 1/29/2008 To: 5/30/2008

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Settlement Report

Type	Setlmnt. Date	Status	Setlmnt. Time	Agent	Address	Comm.	Sale Price	Volume	Gross Revenue	Ref. Fee Out	GCI	BA Comm	LA Comm	TPF	Pre-NCI	NCI	Cum. Net Revenue	SP/LP	DOM
S	1/29/2008	Sett	2:00 PM	MC	10600 River Bend Lane	5.00%	$2,800,000	$2,800,000	$140,000	$0	140,000.00	$140,000.0	$0	$0	$0.00	**$0**		N/A	
Listing Count 0 0.00% **Sale Count** 1 100.00%			**Total for the Month of:**		**January Transactions** 1	5.00%		**$2,800,000**		**$0**	$140,000	$140,000	$0	$0		**$0**			
											Avg. GCI **$140,000**								
L	2/22/2008	Sett		SKG	42 Shelldrake Court	3.00%	$284,900	$3,084,900	$8,547	$0	9,142.00	$427.35	$2,137	$595	$8,714.65	**$6,578**		100.00%	10
S	2/25/2008	Sett	11:00 AM	MC	7375 Michael Avenue	4.00%	$400,000	$3,484,900	$15,720	$0	15,719.60	$15,719.60	$0	$0	$0.00	**$0**		N/A	
S	2/29/2008	Sett		SKG	17635 Kohlhoss Road	3.00%	$280,000	$3,764,900	$8,400	$0	8,695.00	$4,200.00	$0	$295	$4,495.00	**$4,495**		N/A	
Listing Count 1 33.33% **Sale Count** 2 66.67%			**Total for the Month of:**		**February Transactions** 3	3.33%		**$964,900**		**$0**	$33,557	$20,347	$2,137	$890		**$11,073**		100.00%	100.
											Avg. GCI **$11,186**								
L	3/6/2008	Sett		MC	13639 Ansel Terrace	3.00%	$370,000	$4,134,900	$11,100	$0	11,695.00	$0.00	$0	$595	$11,695.00	**$11,695**		97.39%	33
L	3/12/2008	Sett		MC	231 Firehouse Lane	2.50%	$1,125,000	$5,259,900	$28,125	$0	28,125.00	$0.00	$0	$0	$28,125.00	**$28,125**		97.83%	10
S	3/12/2008	Sett		CG	231 Firehouse Lane	2.50%	$1,125,000	$6,384,900	$28,125	$0	28,010.66	$14,062.50	$0	($114)	$13,948.16	**$13,948**		N/A	
L	3/24/2008	Sett		MC	23604 Cornerstone Lane	3.00%	$586,000	$6,970,900	$17,580	$0	18,175.00	$150.00	$3,516	$595	$18,025.00	**$14,509**		98.57%	86
S	3/28/2008	Sett		SKG	11113 Potomac Oaks Drive	3.00%	$919,065	$7,889,965	$3,000	$0	3,295.00	$1,500.00	$0	$295	$1,795.00	**$1,795**		N/A	
S	3/28/2008	Sett		CG	6392 Meandering Woods Co	3.00%	$331,375	$8,221,340	$9,900	$0	10,194.70	$4,949.85	$0	$295	$5,244.85	**$5,245**		N/A	
Listing Count 3 50.00% **Sale Count** 3 50.00%			**Total for the Month of:**		**March Transactions** 6	2.83%		**$4,456,440**		**$0**	$99,495	$20,662	$3,516	$1,666		**$75,317**		97.93%	43.0
											Avg. GCI **$16,583**								
L	4/3/2008	Sett		MC	413 Ridgepoint Place #18	3.00%	$284,900	$8,506,240	$8,547	$0	9,142.00	$0.00	$2,564	$595	$9,142.00	**$6,578**		100.00%	5
S	4/15/2008	Sett	9:00 AM	LY	17104 Hughes Road	3.00%	$400,000	$8,906,240	$12,000	$0	12,000.00	$6,000.00	$0		$6,000.00	**$6,000**		N/A	
S	4/24/2008	Sett	11:00 AM	CG	9129 Goshen Valley Road	2.75%	$825,000	$9,731,240	$22,688	$0	22,687.50	$11,343.75	$0	$0	$11,343.75	**$11,344**		N/A	
L	4/25/2008	Sett	11:00 AM	MC	33 A Golden Ash Way	3.00%	$380,000	$10,111,240	$11,400	$0	11,995.00	$0.00	$3,420	$595	$11,995.00	**$8,575**		98.73%	17
S	4/25/2008	Sett	2:00 PM	CG	1328 Main Mews	3.00%	$548,000	$10,659,240	$16,440	$0	16,440.00	$8,220.00	$0	$0	$8,220.00	**$8,220**		N/A	
S	4/25/2008	Sett	2:00 PM	SKG	3101 N. Hampton Drive	3.00%	$195,000	$10,854,240	$5,850	$1,463	4,387.50	$2,193.75	$0	$0	$2,193.75	**$2,194**		N/A	
S	4/30/2008	Pend	9:00 AM	SKG	525 Redland Boulevard	3.00%	$576,500	$11,430,740	$17,295	$0	17,590.00	$8,647.50	$0	$295	$8,942.50	**$8,943**		N/A	
Listing Count 2 28.57% **Sale Count** 5 71.43%			**Total for the Month of:**		**April Transactions** 7	2.96%		**$3,209,400**		**$1,463**	$94,242	$36,405	$5,984	$1,485		**$51,853**		99.36%	11.0
											Avg. GCI **$13,463**								
L	5/9/2008	Pend		MC	577 Inspiration Lane	2.50%	$710,000	$12,140,740	$17,750	$0	17,750.00	$0.00	$5,325	$0	$17,750.00	**$12,425**		94.79%	77
L	5/30/2008	Pend		MC	24304 Flamingo Terrace	3.00%	$379,900	$12,520,640	$11,397	$2,849	9,142.75	$0.00	$2,564	$595	$9,142.75	**$6,578**		98.70%	58

This Report Includes Settlements for the following date ranges:

From: 1/29/2008 To: 5/30/2008

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Settlement Report

Type	Setlmnt. Date	Status	Setlmnt. Time	Agent	Address	Comm.	Sale Price	Volume	Gross Revenue	Ref. Fee Out	GCI	BA Comm	LA Comm	TPF	Pre-NCI	NCI	Cum. Net Revenue	SP/LP	DOM
S	5/30/2008	Pend		SKG	24304 Flamingo Terrace	3.00%	$379,900	$12,900,540	$11,397	$0	11,692.00	$5,698.50	$0	$295	$5,993.50	**$5,994**		N/A	
Listing Count	2	66.67%	**Total for the Month of:**		**May**	2.83%		**$1,469,800**		**$2,849**	$38,585	$5,699	$7,889	$890		**$24,997**		96.75%	67.5
Sale Count	1	33.33%			**Transactions** 3						Avg. GCI **$12,862**								
Count of Transactions:		**20**			***Grand Totals:***	3.06%		**$12,900,540**		$4,312	**$405,879**	$223,113	$19,526	$4,931		**$163,240**		98.25%	48.25
																		True DOM	**48.25**

Avg Booked Trans. per Month	***5.00***		***Avg. Sale Price***	***$645,027***	***Avg. TPF***	***$260***	***Avg. Gross* Reveune**	**$20,294**	***Avg. Net* Reveune**	***$8,162***
Listing Count:	**8**	**40.00%**	**YTD Volume**	**$12,900,540**			**Gross Comm Rate:**	**3.15%**	**Net Comm Rate:**	**1.27%**
Sale Count:	**12**	**60.00%**	**YTD GCI**	**$405,879**						
			YTD NCI	**$163,240**						

BA Settlement Report Grouped By Agent

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From: 1/29/2008 To: 5/30/2008

Type	Status	Setlmnt. Date	U/C Date	Setlmnt. Time	BS	Address	Sale Price	Volume	Gross Comm.	TPF	Ref. Fee	Comm. Adjust.	BA Comm	LA Comm	Total Comm
S	Settled	2/29/2008	1/30/2008		SKG	17635 Kohlhoss Road	$280,000	$10,545,175	$8,400	$295	$0		$4,200		$4,200
L	Settled	2/22/2008	1/20/2008		SKG	42 Shelldrake Court	$284,900	$10,830,075	$8,547	$595	$0		$427		$2,564
													$4,627		
S	Settled	3/28/2008	8/12/2007		SKG	11113 Potomac Oaks Drive	$919,065	$11,749,140	$3,000	$295	$0		$1,500		$1,500
													$1,500		
S	Settled	4/25/2008	3/31/2008	2:00 PM	SKG	3101 N. Hampton Drive	$195,000	$11,944,140	$5,850	$0	$1,463		$2,194		$2,194
S	Pending	4/30/2008	2/28/2008	9:00 AM	SKG	525 Redland Boulevard	$576,500	$12,520,640	$17,295	$295	$0		$8,648		$8,648
													$10,841		
S	Pending	5/30/2008	4/6/2008		SKG	24304 Flamingo Terrace	$379,900	$12,900,540	$11,397	$295	$0		$5,699		$5,699
													$5,699		
Sale Count: 5 Listing Count 1				Total For:	SKG	6	MTD Volume $2,635,365	$2,635,365	$54,489	$1,775	$1,463	$0	$22,667		$24,804
Avg Trans. per Month 1.50							Avg Sale Price $439,228	Total Comm. Adjust. $0							

Total Assoc. Commission: $24,804 **Avg. BA Commission: $4,533**

Grand Totals All Buyer Agents:		**$12,900,540**	**$405,260**	**$4,931**	**$4,312**		**$223,113**	19526.175	
Count of Transactions: 20									
						Comm. Adjust.	**$0**		
	Avg. Sale Price	***$645,027***	***Avg TPF***	***$260***		***Gross Comm Rate***	***3.15%***		
Total Assoc. Commission: $242,639	***Avg. Net Comm.***	***$8,162***	***Avg BA Comm:***	***$11,156***		***Net Comm Rate***	***1.27%***		

Pending Sales By Buyer Agent Report

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Type	Status	Purchase Address	U/C Date	Settle Date	Sale Price	Buyer	Lender	Title Co.	Source
	CG		**1**						
S	Pending 13823	12340 Morning Light Terr	7/25/2007	8/20/2007	**$565,000**	Leslie Parmelee	USAA Federal Sa	Universal Settlements	Referral-Agent
	Category Total	**1**	Total for: Pending					**Average Sales Price:**	$565,000
	SKG		**2**						
S	Pending 13884	24304 Flamingo Terrace	4/6/2008	5/30/2008	**$379,900**	Laurent Mounaud	Countrywide Hom	Village Settlements	Walk-In
S	Pending 13882	525 Redland Boulevard	2/28/2008	4/30/2008	**$576,500**	Lawrence Libera	Countrywide Hom		Referral-Personal
	Category Total	**2**	Total for: Pending					**Average Sales Price:**	$478,200

Grand Totals: **$1,521,400**

Count of Pending Sales: **3**

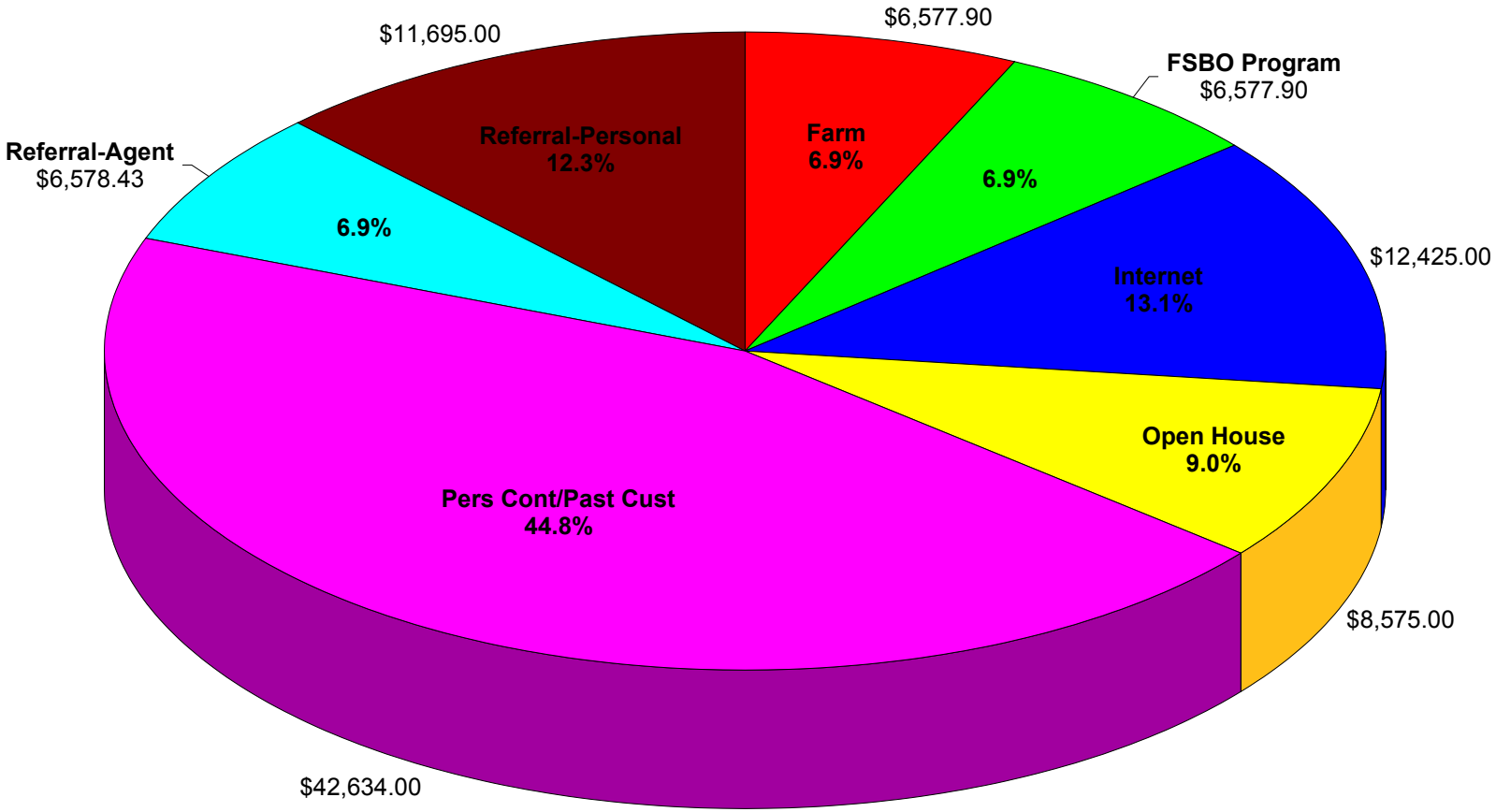
Averages: ***$507,133***

Transactions Source

MC

Total BA Comm By Agnt	**$577**
Total LA Commission	**$19,526**
Total Assoc. Commission	**$20,104**

Earliest Set. Date: 2/22/2008
Latest Set. Date: 5/30/2008



Transaction Source Report

Settlement Year 2008 **Earliest Set. Date** 1/29/2008 **Latest Set. Date** 5/30/2008

Type	Status	Address	Name	Sale Price	GCI	Total Comm.	U/C Date	Sett. Date	Days	BA
Settlement Year	**2008**									
Farm										
S	Settled	11113 Potomac Oaks Drive	Bragi Valgeirsson	$919,065	$3,295.00	$1,795	8/12/2007	3/28/2008	229	SKG
L	Settled	413 Ridgepoint Place #18	Barbara Babuska	$284,900	$9,142.00	$6,578	2/20/2008	4/3/2008	43	MC
Total For:	**2008**									
Total:	Farm	**2**		$1,203,965.00		**$8,373**				
FSBO Program										
L	Settled	42 Shelldrake Court	Ken & Sara Custer	$284,900	$9,142.00	$6,578	1/20/2008	2/22/2008	33	SKG
Total For:	**2008**									
Total:	FSBO Program	**1**		$284,900.00		**$6,578**				
Internet										
L	Pending	577 Inspiration Lane	Greg Lomax	$710,000	$17,750.00	$12,425	4/11/2008	5/9/2008	28	MC
Total For:	**2008**									
Total:	Internet	**1**		$710,000.00		**$12,425**				
Open House										
S	Settled	231 Firehouse Lane	Brian & Karen Galla	$1,125,000	$28,010.66	$13,948	2/10/2008	3/12/2008	31	CG
S	Settled	9129 Goshen Valley Road	Gregory Teneyck	$825,000	$22,687.50	$11,344	1/6/2008	4/24/2008	109	CG
L	Settled	33 A Golden Ash Way	Rhan Yi	$380,000	$11,995.00	$8,575	3/24/2008	4/25/2008	32	MC
Total For:	**2008**									
Total:	Open House	**3**		$2,330,000.00		**$33,867**				
Our Seller										
S	Settled	1328 Main Mews	Rhan Yi	$548,000	$16,440.00	$8,220	3/29/2008	4/25/2008	27	CG
Total For:	**2008**									
Total:	Our Seller	**1**		$548,000.00		**$8,220**				
Pers Cont/Past Cus										
S	Settled	10600 River Bend Lane	Steve Tennant	$2,800,000	$140,000.00	$0	12/11/2007	1/29/2008	49	MC
S	Settled	7375 Michael Avenue	Carol Michelson	$400,000	$15,719.60	$0	10/15/2007	2/25/2008	133	MC
L	Settled	231 Firehouse Lane	Steve Tennant	$1,125,000	$28,125.00	$28,125	2/10/2008	3/12/2008	31	MC
L	Settled	23604 Cornerstone Lane	Carol Michelson	$586,000	$18,175.00	$14,509	1/27/2008	3/24/2008	57	MC

Transaction Source Report

Settlement Year 2008 **Earliest Set. Date** 1/29/2008 **Latest Set. Date** 5/30/2008

Type	Status	Address	Name	Sale Price	GCI	Total Comm.	U/C Date	Sett. Date	Days	BA
S	Settled	6392 Meandering Woods Cour	Jessica Lynn Pacos	$331,375	$10,194.70	$5,245	1/6/2008	3/28/2008	82	CG
Total For:	**2008**									
Total:	Pers Cont/Past Cust	**5**		$5,242,375.00		**$47,879**				
Referral-Agent										
S	Settled	3101 N. Hampton Drive	Anthony Coyle	$195,000	$4,387.50	$2,194	3/31/2008	4/25/2008	25	SKG
L	Pending	24304 Flamingo Terrace	Steven Penso	$379,900	$9,142.75	$6,578	4/6/2008	5/30/2008	54	MC
Total For:	**2008**									
Total:	Referral-Agent	**2**		$574,900.00		**$8,772**				
Referral-Personal										
L	Settled	13639 Ansel Terrace	John Karayianis	$370,000	$11,695.00	$11,695	2/18/2008	3/6/2008	17	MC
S	Settled	17104 Hughes Road	Brian & Tricia Brad	$400,000	$12,000.00	$6,000	2/21/2008	4/15/2008	54	LY
S	Pending	525 Redland Boulevard	Lawrence Libera	$576,500	$17,590.00	$8,943	2/28/2008	4/30/2008	62	SKG
Total For:	**2008**									
Total:	Referral-Personal	**3**		$1,346,500.00		**$26,638**				
Sign Call										
S	Settled	17635 Kohlhoss Road	Maria Johnson	$280,000	$8,695.00	$4,495	1/30/2008	2/29/2008	30	SKG
Total For:	**2008**									
Total:	Sign Call	**1**		$280,000.00		**$4,495**				
Walk-In										
S	Pending	24304 Flamingo Terrace	Laurent Mounaud	$379,900	$11,692.00	$5,994	4/6/2008	5/30/2008	54	SKG
Total For:	**2008**									
Total:	Walk-In	**1**		$379,900.00		**$5,994**				
	Total Transaction:	**20**		**$12,900,540**	**$405,879**	**163,240**				

Transaction Source Report

Settlement Year 2008 **Earliest Set. Date** 2/22/2008
Latest Set. Date 5/30/2008

Type	Status	Address	Name	Sale Price	GCI	Total Comm.	U/C Date	Sett. Date
Settlement Year	**2008**							
Farm								
L	Settled	413 Ridgepoint Place #18	Barbara Babuska	$284,900	$9,142.00	$6,578	2/20/2008	4/3/2008
	Total:	Farm **1**		$284,900.00		**$6,578**		
FSBO Program								
L	Settled	42 Shelldrake Court	Ken & Sara Custer	$284,900	$9,142.00	$6,578	1/20/2008	2/22/2008
	Total:	FSBO Program **1**		$284,900.00		**$6,578**		
Internet								
L	Pending	577 Inspiration Lane	Greg Lomax	$710,000	$17,750.00	$12,425	4/11/2008	5/9/2008
	Total:	Internet **1**		$710,000.00		**$12,425**		
Open House								
L	Settled	33 A Golden Ash Way	Rhan Yi	$380,000	$11,995.00	$8,575	3/24/2008	4/25/2008
	Total:	Open House **1**		$380,000.00		**$8,575**		
Pers Cont/Past Cus								
L	Settled	231 Firehouse Lane	Steve Tennant	$1,125,000	$28,125.00	$28,125	2/10/2008	3/12/2008
L	Settled	23604 Cornerstone Lane	Carol Michelson	$586,000	$18,175.00	$14,509	1/27/2008	3/24/2008
	Total:	Pers Cont/Past Cust **2**		$1,711,000.00		**$42,634**		
Referral-Agent								
L	Pending	24304 Flamingo Terrace	Steven Penso	$379,900	$9,142.75	$6,578	4/6/2008	5/30/2008
	Total:	Referral-Agent **1**		$379,900.00		**$6,578**		
Referral-Personal								
L	Settled	13639 Ansel Terrace	John Karayianis	$370,000	$11,695.00	$11,695	2/18/2008	3/6/2008
	Total:	Referral-Personal **1**		$370,000.00		**$11,695**		
		Total Transaction: **8**		**$4,120,700**	**$115,166.75**	**$95,063**		

History: Listings Taken

	1	2	3	4	5	6	7	8	9	10	11	12	*Total*	*Avg.*
	LT	LT	LT	LT	LT	LT	LT	LT	LT	LT	LT	LT	LT	LT
1997	4	5	12	5	8	6	8	9	5	10	5	8	85	7.08
1998	5	10	5	8	14	13	6	8	8	5	3	16	101	8.42
1999	7	8	8	12	6	6	7	5	6	3	7	1	76	6.33
2000	4	6	9	10	7	8	7	4	7	3	5	3	73	6.08
2001	4	3	3	4	5	5	5	5	5	5	3	1	48	4.00
2002	5	1	4	2	10	5	3	5	4	3	3	2	47	3.92
2003	11	3	6	6	7	2	4	8	4	6	5		62	5.64
2004	5	6	5	7	8	8	6	6	2	3	4	4	64	5.33
2005	1	1	3	2	2	4	4	4	4	3			28	2.80
2006	2	1	2	4	25	1	3	3	3	5	1		50	4.55
2007			3	3	1	2	1	1	2	1		2	16	1.78
2008	5	2	1	5									13	3.25
Avg.	4.82	4.18	5.08	5.67	8.45	5.45	4.91	5.27	4.55	4.27	4.00	4.63		5.14
Total	53	46	61	68	93	60	54	58	50	47	36	37	663	

Listings Taken History Report:

Listed Year 2008

Earliest List Date 1/10/2008

Latest List Date 4/15/2008

	Type	LD	U/C	SD	Address	Contact	List Price	Sale Price
Settled	L	01/13/08	02/18/0	3/6/2008	13639 Ansel Terrace	John Karayianis	$379,900	$370,000
Settled	L	01/24/08	02/10/0	3/12/200	231 Firehouse Lane	Steve Tennant	$1,150,000	$1,125,000
Pending	L	01/30/08	04/06/0	5/30/200	24304 Flamingo Terrace	Steven Penso	$384,900	$379,900
Settled	L	01/10/08	02/20/0	4/3/2008	413 Ridgepoint Place #18	Barbara Babuska	$284,900	$284,900
Active	L	01/14/08			12407 Rousseau Terrace	James Krejci	$699,000	
January		**5**			*Avg. List Price: $579,740*	*Average Sale Price:*	*$539,950*	
Settled	L	02/07/08	03/24/0	4/25/200	33 A Golden Ash Way	Rhan Yi	$384,900	$380,000
Active	L	02/01/08			227 Thaxton Street	Tim & June Bradley	$869,000	
February		**2**			*Avg. List Price: $626,950*	*Average Sale Price:*	*$380,000*	
Active	L	03/14/08			408 Ridgepoint Place #38	Peggy Perry	$329,950	
March		**1**			*Avg. List Price: $329,950*	*Average Sale Price:*		
Future	F	04/15/08			16420 Montecrest	Paul Gadoci	$325,900	
Active	L	04/15/08			110 Chevy Chase Street	Rebecca Haven	$325,900	$325,900
Future	F	04/07/08			15312 Masonwood Drive	Robert Ryan	$1,495,000	$1,495,000
Active	L	04/01/08			5612 Silver Oak Court	Brian & Karen Galla	$1,189,000	
Active	L	04/02/08			203 Thaxton Street	Jeffrey Boggs	$1,100,000	$1,100,000
April		**5**			*Avg. List Price: $887,160*	*Average Sale Price:*	*$973,633*	

Total: 2008	**13**	**Average List Price:**	**$686,027**	**Total Volume:** **$5,460,700** **SP/LP**
		Average Sale Price For The Year:	**$682,588**	**Total List Price:** **$8,918,350** **61.23%**

History of Listings Sold

	1	2	3	4	5	6	7	8	9	10	11	12	*Total*	*Avg.*
	LS	LS	LS	LS	LS	LS	LS	LS	LS	LS	LS	LS	LS	LS
1997	5	2	8	7	8	5	8	7	11	7	6	6	80	6.7
1998	11	9	8	5	6	12	12	13	7	6	8	3	100	8.3
1999	5	9	13	8	9	13	8	4	3	10	6	1	89	7.4
2000	6	7	11	8	8	7	7	5	10	4	4	3	80	6.7
2001	5	1	4	3	5	5	3	8	4	6	2	2	48	4.0
2002	1	3	7	3	6	7	4	7	1	4	1		44	4.0
2003	9	5	7	3	7	7	3	7	4	5	8	2	67	5.6
2004		8	3	8	6	9	7	4	7		3	6	61	6.1
2005	2		3	2	5	1	5	2	4	3	1	1	29	2.6
2006	1		1	4	9	1	7	10	3	5	4	4	49	4.5
2007	3		2	1	2	3		1		3	1		16	2.0
2008	2	3	1	2									8	2.0
Avg.	4.5	5.2	5.7	4.5	6.5	6.4	6.4	6.2	5.4	5.3	4.0	3.1		5.3

History of Sales Booked

	1	2	3	4	5	6	7	8	9	10	11	12	*Total*	*Avg.*
	Sales	Sales	Sales	Sales	Sales	Sales	Sales	Sales	Sales	Sales	Sales	Sales	Sales	Sales
1997	7	5	2	4	5	4	5	3	6	2	7	2	52	4.3
1998	4	3	10	4	5	5	7	2	4	4	4	3	55	4.6
1999	9	7	9	7	4	11	4	2	3	9	3	1	69	5.8
2000	5	8	2	12	6	6	6	5	6	2	5	5	68	5.7
2001	2	5	5	6	7	4	9	4	6	2	7	1	58	4.8
2002	3	5	3	6	9	2	2	2	1		3	3	39	3.5
2003	7	5	4	7	4	4	2		9	2	5	4	53	4.8
2004	2	2		6	3	2	4	2	3	4	3	2	33	3.0
2005	4		5	1	3	1	3	5	4	6	2		34	3.4
2006	4	1	1	1	5	4	1	4	1	5	4	2	33	2.8
2007	2	3	2			1	1	3		1		1	14	1.8
2008	3	3	2	1									9	2.3
Avg.	4.3	4.3	4.1	5.0	5.1	4.0	4.0	3.2	4.3	3.7	4.3	2.4		4.1
Total	52	47	45	55	51	44	44	32	43	37	43	24		
Total	52	47	45	55	51	44	44	32	43	37	43	24	517	

Volume History

	1	2	3	4	5	6	7	8	9	10	11	12	**Total**	**Avg.**
	Volume	**Volume**	**Volume**	**Volume**	**Volume**	**Volume**	**Volume**	**Volume**	**Volume**	**Volume**	**Volume**	**Volume**	**Volume**	**Volume**
1995	$1,734,990	$537,500	$656,750	$2,123,414	$1,027,000	$595,000	$1,983,200	$2,054,245	$1,629,500	$1,344,995	$479,000	$1,850,345	**$16,015,939**	**$1,334,662**
1996	$836,000	$74,000	$1,078,850	$1,170,500	$2,280,400	$2,320,300	$4,304,846	$1,563,010	$2,464,293	$1,238,750	$2,382,967	$2,029,900	**$21,743,816**	**$1,811,985**
1997	$737,145	$2,496,400	$639,000	$1,917,660	$1,647,000	$2,706,365	$2,819,950	$3,133,995	$3,044,800	$3,250,400	$2,576,900	$2,601,160	**$27,570,775**	**$2,297,565**
1998	$1,452,000	$2,061,400	$2,552,500	$2,068,400	$4,184,000	$4,429,700	$3,707,050	$5,511,000	$4,072,911	$2,182,800	$2,537,830	$4,868,378	**$39,627,969**	**$3,302,331**
1999	$2,270,620	$2,811,000	$2,947,800	$3,176,236	$4,731,174	$5,321,145	$6,945,450	$4,572,721	$2,685,452	$1,699,610	$3,713,800	$2,705,871	**$43,580,879**	**$3,631,740**
2000	$2,532,927	$2,059,350	$1,742,885	$2,521,171	$6,338,520	$4,199,630	$4,494,950	$5,394,449	$4,317,892	$1,898,400	$3,931,038	$1,773,000	**$41,204,212**	**$3,433,684**
2001	$1,587,400	$2,169,154	$1,955,730	$1,810,400	$4,576,140	$4,575,600	$2,314,000	$7,252,138	$3,461,890	$4,118,326	$2,528,000	$2,892,791	**$39,241,569**	**$3,270,131**
2002	$427,920	$1,630,125	$3,089,105	$2,244,390	$2,833,400	$1,887,368	$3,566,770	$5,176,850	$4,081,800	$586,000	$1,855,395	$1,797,000	**$29,176,123**	**$2,431,344**
2003	$2,143,158	$3,959,806	$5,520,890	$4,670,200	$3,926,800	$4,410,000	$5,139,695	$3,058,400	$2,920,500	$5,455,750	$3,264,795	$4,920,800	**$49,390,794**	**$4,115,900**
2004	$1,164,900	$580,000	$4,806,825	$2,346,604	$4,092,800	$4,688,501	$8,989,940	$4,123,700	$2,084,400	$5,117,200	$3,333,999	$4,269,800	**$45,598,669**	**$3,799,889**
2005	$3,952,699	$1,312,400	$1,815,650	$4,010,000	$3,311,405	$5,433,151	$1,071,200	$2,700,750	$2,464,755	$1,998,800	$5,680,800	$6,036,800	**$39,788,410**	**$3,315,701**
2006	$1,657,400		$4,180,790	$1,105,000	$2,698,000	$5,589,000	$2,303,600	$4,610,725	$3,147,300	$3,080,200	$4,600,616	$4,231,300	**$37,203,931**	**$3,382,176**
2007	$1,274,500	$1,320,000	$3,028,400	$1,282,900	$552,500	$1,882,000	$1,306,900	$773,000	$1,817,000		$1,209,900	$1,804,900	**$16,252,000**	**$1,477,455**
2008	$2,800,000	$964,900	$4,456,440	$3,209,400	$1,469,800								**$12,900,540**	**$2,580,108**
Avg.	**$1,755,119**	**$1,690,464**	**$2,747,973**	**$2,404,020**	**$3,119,210**	**$3,695,212**	**$3,765,196**	**$3,840,383**	**$2,937,884**	**$2,664,269**	**$2,930,388**	**$3,214,003**		**$2,888,652**
Total	$24,571,659	$21,976,035	$38,471,615	$33,656,275	$43,668,939	$48,037,760	$48,947,551	$49,924,983	$38,192,493	$31,971,231	$38,095,040	$41,782,045	**$459,295,626**	

Lending Report

Type	Address	Sale Price	Settlement Date	Loan Amount	Interest Rate	Term	2nd Loan Amount	Loan Type	2nd Loan Rate	Buyer Agent
L	33 A Golden Ash Way	$380,000	4/25/08							MC
L	13639 Ansel Terrace	$370,000	3/6/08							MC
S	6392 Meandering Woods Co	$331,375	3/28/08							CG
3	**Volume:**	**$1,081,375**	**1st Loan:**	**$0**	**2nd Loan:**		**$0**			
Bank of America										
L	231 Firehouse Lane	$1,125,00	3/12/08							MC
S	231 Firehouse Lane	$1,125,00	3/12/08							CG
L	42 Shelldrake Court	$284,900	2/22/08	$284,900						SKG
3	**Volume:**	**$2,534,900**	**1st Loan:**	**$284,900**	**2nd Loan:**		**$0**			
Cartus Home Loans										
L	23604 Cornerstone Lane	$586,000	3/24/08	$400,000			$100,000			MC
1	**Volume:**	**$586,000**	**1st Loan:**	**$400,000**	**2nd Loan:**		**$100,000**			
Countrywide Home Loans										
L	24304 Flamingo Terrace	$379,900	5/30/08	$368,503	5.75	30				MC
S	24304 Flamingo Terrace	$379,900	5/30/08	$373,920	5.75	30				SKG
S	17635 Kohlhoss Road	$280,000	2/29/08							SKG
S	1328 Main Mews	$548,000	4/25/08	$417,000						CG
S	3101 N. Hampton Drive	$195,000	4/25/08	$195,000						SKG
S	525 Redland Boulevard	$576,500	4/30/08							SKG
6	**Volume:**	**$2,359,300**	**1st Loan:**	**$1,354,423**	**2nd Loan:**		**$0**			
Fitzgerald Financial Group										
L	413 Ridgepoint Place #18	$284,900	4/3/08							MC
1	**Volume:**	**$284,900**	**1st Loan:**	**$0**	**2nd Loan:**		**$0**			
National City Mortgage										
S	11113 Potomac Oaks Drive	$919,065	3/28/08							SKG
1	**Volume:**	**$919,065**	**1st Loan:**	**$0**	**2nd Loan:**		**$0**			
Presidential Bank										
S	17104 Hughes Road	$400,000	4/15/08	$408,600				VA		LY
L	577 Inspiration Lane	$710,000	5/9/08							MC
2	**Volume:**	**$1,110,000**	**1st Loan:**	**$408,600**	**2nd Loan:**		**$0**			
Pulte Mortgage LLC										
S	7375 Michael Avenue	$400,000	2/25/08							MC
1	**Volume:**	**$400,000**	**1st Loan:**	**$0**	**2nd Loan:**		**$0**			

Lending Report

Type	Address	Sale Price	Settlement Date	Loan Amount	Interest Rate	Term	2nd Loan Amount	Loan Type	2nd Loan Rate	Buyer Agent
SunTrust Mortgage										
S	9129 Goshen Valley Road	$825,000	4/24/08							CG
1	**Volume:**	**$825,000**	**1st Loan:**	**$0**	**2nd Loan:**		**$0**			
Toll Bros.										
S	10600 River Bend Lane	$2,800,00	1/29/08							MC
1	**Volume:**	**$2,800,000**	**1st Loan:**	**$0**	**2nd Loan:**		**$0**			

FORMS

Goal Setting Work Sheet

Can you get there from here??

Desired annual Income	A)	$100,000
Average Sale Price	B)	$350,000
X .267 Avg. Commission (= Avg. Gross Comm.)	C)	$9,345
X .46 Buyer Specialist Split (= Avg. Net Per Deal)	D)	$4,298
# Units Required (Divide A by D)	E)	23
Divide by Avg. Conversion Rate (10%)	F)	230 Leads Req.
Divide by Avg. Conversion Rate (20%)	*G)*	*1150 Leads Req.*

Goal Setting Work Sheet

Can you get there from here??

Desired annual Income	A)_____
Average Sale Price	B)_____
X .267 Avg. Commission (= Avg. Gross Comm.)	C)_____
X .46 Buyer Specialist Split (= Avg. Net Per Deal)	D)_____
# Units Required (Divide A by D)	E)_____
Divide by Avg. Conversion Rate (10%)	F)_____
Divide by Avg. Conversion Rate (20%)	*G)*_____

Economic Plan for _____

Year

	GOAL	
1.	**$**	Net Income (before taxes)
2.		Gross Closed Income (GCI) = Net Income ¸ Income % of GCI
3.		Cost of Sales
4.		Operating Expenses

	Sellers			Buyers		
5.			**Gross Revenue from Sellers**			**Gross Revenue from Buyers**
6.	¸	**%**	**Your Commission**	¸	**%**	**Your Commission**
7.	**=**		**Seller Sold Volume**	**=**		**Buyer Sold Volume**
8.	¸		**Your Average Sales Price**	¸		**Your Average Sales Price**
9.	**=**		**Sellers Sold (transactions)**	**=**		**Buyers Sold (transactions)**
10.	¸	**%**	**Your Seller Trans. Conversion Rate**	¸	**%**	**Your Buyer Trans. Conversion Rate**
11.	**=**		**Seller Listings Taken**	**=**		**Buyer Listings Taken**
12.	¸	**%**	**Your Seller Appt. Conversion Rate**	¸	**%**	**Your Buyer Appt. Conversion Rate**
13.	**=**		**Seller Listing Appointments**	**=**		**Buyer Listing Appointments**
14.	¸ **12**		**Seller Listing Appts per month**	¸ **12**		**Buyer Listing Appts per month**

Your Economic Model

Your Economic Numbers

To know where you are going, you must first know where you are. In the table below enter your current tracking numbers and related information. If you don't know there numbers (you should!), use your best guess.

1.	Current GCI	_____		
2.	Cost of Sales	_____	_____% of GCI	
3.	Operating Expenses (add 3 and 4)	_____	_____% of GCI	
4.	Total Expenses	_____	_____% of GCI	
5.	Source of Business		Sellers	_____%
			Buyers	_____%
6.	My Average Commissions		Overall	_____%
			Sellers	_____%
			Buyers	_____%
7.	My Average Sale Price		Overall	_____
			Sellers	_____
			Buyers	_____
8.	My Conversion Rate for Listings Taken to Listings Closed & Buyer Contracts Ratified to Buyers Sales Closed		Sellers	_____%
			Buyers	_____%
9.	My Conversion Rate for Listing Appts. to Listings Taken & Buyer Appts. to Buyers Retainer Agreements Signed		Sellers	_____%
			Buyers	_____%

LISTING APPOINTMENTS TO SIGNED LISTING AGREEMENTS
CONVERSION RATES

Month: ____________________________		Year: _____________________	
Appt. Date	Seller Name	Address	Listing Signed
Total Appts			Total # Listings Signed

# of Listings Signed ÷ Total # Appts = ________________% Converted

ANNUAL BUYER SELLER CONVERSION RATES

Year: _____

	BUYERS			SELLERS		
Month	# of Appts	Signed Agreements	% Converted	# of Appts	Signed Agreements	% Converted
JAN						
FEB						
MAR						
APR						
MAY						
JUNE						
JULY						
AUG						
SEPT						
OCT						
NOV						
DEC						
TOTALS						

BUYER APPOINTMENTS TO SIGNED RETAINER AGREEMENTS
COVERSION RATES

Month: ____		Year:
Appt. Date	Buyer Name	Retainer Signed
Total Appts		Total Retainers Signed

# of Retainers Signed ÷ Total # Appts = _________________% Converted