



MAGIC

Managing And Gaining Important *Contacts*

Prepared by: _____

As a real estate professional, my business development efforts depend largely on my efforts to work my sphere of influence, follow up on leads and develop a relationship with one or more mortgage professionals (loan officer or mortgage broker).

Management of my sphere of influence will assure my continued success. This document identifies how I will manage my sphere of influence.

I will target the following family members:

_____	_____	_____
_____	_____	_____
_____	_____	_____

I will target the following friends/acquaintances:

_____	_____	_____
_____	_____	_____
_____	_____	_____

I will target the following businesses:

_____	_____	_____
_____	_____	_____
_____	_____	_____

I will target the following mortgage professionals:

_____	_____	_____
_____	_____	_____
_____	_____	_____

I will join and take an active role in the following organizations:

- 1.
- 2.
- 3.
- 4.
- 5.

Each week, I will make a written contact with my sphere of influence. I have listed below the first 10 mailings I will do and when I will complete them:

Center Of Influence	Type Of Written Contact	Date	Center Of Influence	Type Of Written Contact	Date
1.			2.		
3.			4.		
5.			6.		
7.			8.		
9.			10.		

I will commit to ____ face-to-face meetings with someone in my sphere of influence each week, and I will identify their needs and ask for the opportunity to help them.

I will commit to ____ hours per day to prospecting and maintaining telephone contact with people in my sphere of influence.

I commit to spend ____% of my income to market myself to my sphere of influence & my markets (\$ = _____)

With the income that I am reinvesting in my business, I plan to: _____

I plan to earn the business of _____ leads with a confirmed need.

I commit to send the follow-up surveys to clients within ____ days of settlement.

I will send handwritten thank-yous to my clients and my mortgage/loan officer.

I will send the following thank you gift to each new homeowner I close: _____

Goals for monthly closes and number of new contacts:

January:	New Contacts: _____	Closings: _____
February:	New Contacts: _____	Closings: _____
March:	New Contacts: _____	Closings: _____
April:	New Contacts: _____	Closings: _____
May:	New Contacts: _____	Closings: _____
June:	New Contacts: _____	Closings: _____
July:	New Contacts: _____	Closings: _____
August:	New Contacts: _____	Closings: _____
September:	New Contacts: _____	Closings: _____
October:	New Contacts: _____	Closings: _____
November:	New Contacts: _____	Closings: _____
December:	New Contacts: _____	Closings: _____

1. Annual income desired: _____

2. Average sale: _____

3. Average commission: _____

4. In order to close ____ buyer/seller deals, ____% of my prospects will need to convert to “live” clients and ____% of my clients will need to close.

To improve my focus and service to my sphere of influence and my customers, I will do the following:

Action To Take	With Whom	When
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

“Success is ensured when an initiative is sheduled and the schedule is adhered to”, i.e., “plan your work and work your plan.” In keeping with these thoughts, my planned monthly marketing initiatives for the next year are as follows:

January

February

March

April

May

June

July

August

September

October

November

December

Competition:

The following are the foremost competitors in my territory, along with their strength and weaknesses:

The following are my strengths and weaknesses, in comparison to the above:

Signed: _____ Date: _____ Accepted: _____ Date: _____

Reviewed: _____
1st Quarter (Jan., Feb., Mar.) - 2nd Quarter (Apr., May, Jun.,) - 3rd Quarter (Jul., Aug., Sept.,) - 4th Quarter (Oct., Nov., Dec.,)