

## HOW TO USE THE MONTHLY SECTIONS

**At the start of each month, fill in the Main Goals/Tasks/"Big Rocks" page.**

Use this page to get your "Big Rocks" into your month's schedule. You may choose to re-state some of the tasks from your Goals Worksheets, and you may also choose to insert other important items – even ones that don't appear on your business plan. "Big Rocks" don't *only* come from your business plan. For instance, you may have to recruit and hire a new administrative assistant because your existing person in that position is leaving. Preparing for such an undertaking certainly qualifies as a "Big Rock."

Keep it under control, though, and don't let this page turn into a simple "to-do list." Remember the purpose of the page: to keep this month's "Big Rocks" on your radar screen.

*To truly turn your goals and plans into actions, get this info onto someone's calendar or to-do list!*

**At the end of each month, fill in the Results and Monthly Summary pages.**

### **Monthly Results Page**

The first thing you'll notice is that there is plenty of data to be entered, and it's all going to be handwritten. It looks like a lot of work. It is, but read on ...

We intentionally made this a manual entry chart. We could have simply made up a page that said, "Print out reports from your agency and insert them here." But we didn't. Here's why we want you to manually enter all this data: *This is as much a learning exercise as it is a results-measuring exercise.*

Many real estate agents, by their own admission, don't have a good handle on their numbers. One of the best ways to become intimately familiar with the numbers is to work with them. And that's just what you'll do in this section – get the required numbers from your agency or on various reports supplied by your agency, fill them into the blanks in this book, and calculate results in your workbook. This will be a terrific learning experience if you stick with it and don't cut corners. Take the small amount of time it requires, knowing that you're gaining proficiency each time you do it.

The various measures to be entered are exactly the same ones that you worked with earlier in this workbook - in your annual plan. They even use the same numbering sequence 1 thru 15.

For each one, enter both your results from the month you're working in, plus your Year-to-Date (YTD) results. Carry the totals to the far right column.

Just like the annual plan, the monthly pages provide up to 4 Niche Market columns. If you don't want to use them, just enter all your results in the far right Total column.

## Monthly Summary Page

This may well be the most important page to complete each month. It is where you take the time to carefully and objectively analyze what worked well and what didn't work so well.

Be sure to set aside time after each month to reflect, record, analyze and plan. Really use the information you record on these pages to improve each and every month – to build on successes and avoid repeating mistakes.

**Sample Only**