



TURN THE GOAL INTO THE ACTIVITY

A practical worksheet for turning an annual goal into a working plan

A goal is useful. A goal with activity behind it is much more useful. This worksheet works backward from the business you want and turns it into something you can actually watch during the year.

1. Start with the result

My transaction goal for the next 12 months:

Of those, I expect roughly this many seller sides:

And roughly this many buyer sides:

2. Work backward from your own numbers

The old-school shortcut is to use somebody else's conversion formula. A better long-term system is to learn yours. If you do not know it yet, make a reasonable planning assumption - then track the real number and replace the guess.

WORK IT BACKWARD	MY NUMBER	HOW I GOT THERE
Transactions wanted this year		Start with the goal
Conversations / opportunities per closing		Use your history or a planning assumption
Conversations / opportunities needed this year		Goal x your ratio
Needed per month		Annual activity / working months
Needed per week		Monthly activity / working weeks
Needed per working day		Weekly activity / working days

DON'T KNOW YOUR RATIO YET? That is not a failure. It just tells you what to start measuring.

TRACK THE ACTIVITY THAT MATTERS

You do not need to track everything just because it can be counted. Pick the activities that connect to the business you are trying to build.

3. Choose your scoreboard

Circle, highlight or rewrite the handful that matter to your plan. Add your own if your business works differently.

☐ Past-client / sphere conversations	☐ Listings sold
☐ New connections	☐ Buyer sales
☐ Lead follow-up conversations	☐ Closed transactions
☐ Buyer leads	☐ Open houses held
☐ Buyer appointments	☐ Useful social/content posts
☐ Listing leads	☐ Mailers / newsletters
☐ Listing appointments	☐ Referral-source conversations
☐ Listings taken	☐ Other: _____

4. Give the next 30 days a job

The ONE result I want to improve this month:

The 2-3 activities I will consistently track:

What I will change if the activity is happening but the result is not:

THE POINT: Do not just stare at the annual goal. Watch the behavior that has a chance of creating it.