

Management Tools/Goal Setting Meeting Form/Mortgage/Sales Manager

GOAL SETTING MEETING

ASM: _____ SM: _____ Date: _____

| Key Metrics | Goal | Actual | Met Y/N | Next Month's Goals |
|------------------------------|------|--------|---------|--------------------|
| Total Applications | | | | |
| Purchase | | | | |
| HELD | | | | |
| Monthly Adjustable | | | | |
| Expanded Criteria | | | | |
| Super Jumbo | | | | |
| Total Funding | | | | |
| Purchase | | | | |
| HELD | | | | |
| Monthly Adjustable | | | | |
| Expanded Criteria | | | | |
| Super Jumbo | | | | |
| Volume | | | | |
| BP Efficiency | | | | |
| Total / Funding BPs | | | | |
| GSMs | | | | |
| Field visits with AEs | | | | |
| # of AEs / BP Calls | | | | |
| Recruiting | | | | |
| Phone Contact New / Existing | | | | |
| Appts Held New / Existing | | | | |

OBSERVATIONS:

ACTION STEPS:

1. _____
2. _____
3. _____

EXPECTED HELP FROM SALES MANAGER:
