Management Tools/Goal Setting Meeting Form/Mortgage/Sales Manager GOAL SETTING MEETING

	GOAL SE	TITING WEETING	•	
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				
Applis Held New / Existing				
OBSERVATIONS:				
ACTION STEPS: 1. 2.				
3.				
EXPECTED HELP FROM SA	ALES MANAGER:			

Contact Author Steve Johnson @ 310-643-7700

www.nextlevelsalesconsulting.com