

Agent Discussion for Sept 2017 Data

Summary:

Agent is on track to exceed the annual CGI goal established in the CGI tracker. This agent desired a pre-tax profit of \$120K for the calendar year, and is a buyer's agent on a team. She has a 50%/50% split with the team on the buyer's side, and expects to convert 64% of buyers appointment's to contracts. Current "CGI" is \$123,516 with 3 months remaining to hit the CGI goal of \$136,500.

Although both "Closed Units" and "Buy Sales Closed" are down year over year (-7% and -9.1% respectively), the agent focused this year on homes with a higher average sale price driving an increase of +25.9% in GCI. Her average home sale price increase year over year is currently at 58.6%.

Opportunities:

The agent still manually tracks "CGI Appointments" rather than taking advantage of the tools which would allow integrating this data into the multiyear tracking. Either using the mobile app or entering the appointment's taken numbers into the computer based CGI calculator is a better option to easily integrate appointments into the trending data.

Contracts written are up year over year by 17%, however closed sales are down -9%. This year there has been an increase in multiple offer situations and higher completion by buyers for the reduced number of listings in this price range. Working on scripts for helping buyers present solid offers should help improve this area.

Overall MLS listings in the price range where the agent is focusing indicate inventory levels continue to fall. A high level of attention to lead generation activities will be needed to combat seasonality effects and position the agent for an amazing end to 2017 and a fast start to 2018.

Multi-Year Trends



CGI Appointments

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013														0%	0%
2014														0%	0%
2015														0%	0%
2016														0%	0%
2017														0%	0%

Closed Units

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013														0.0%	0.0%
2014	2.0			1.0		1.0	1.0	1.0			1.0	1.0	8.0	0.0%	0.0%
2015	1.0	3.0	1.0	5.0	2.0	5.0	2.0	2.0	3.0	2.5	2.2	1.1	29.8	0.0%	300.0%
2016	2.2	1.1	1.6	1.1	3.2	4.0	1.9	1.5	2.9	1.1		1.3	21.8	-3.3%	-19.4%
2017	1.2	1.3	0.6	2.6	2.8	2.0	3.5	1.3	2.8				18.0	-5.2%	-7.0%

Closed Sales Volume

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013														0.0%	0.0%
2014	174,000			190,000		150,000	72,000	80,700			410,000	104,160	1,180,860	0.0%	0.0%
2015	95,000	329,900	167,000	785,650	400,000	595,900	384,500	279,000	695,000	581,630	606,300	189,200	5,109,080	0.0%	459.8%
2016	346,665	215,600	187,050	323,125	626,395	594,437	276,649	326,050	488,825	308,825		441,700	4,135,321	-29.7%	-9.3%
2017	293,000	315,185	143,700	800,623	462,500	437,000	930,500	362,000	681,500				4,426,008	39.4%	30.8%

Listings Taken

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013														0.0%	0.0%
2014						2.0							2.0	0.0%	0.0%
2015														0.0%	-100.0%
2016														0.0%	0.0%
2017								0.3					0.3	0.0%	0.0%

Listings Taken Volume

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013														0.0%	0.0%
2014						252,000							252,000	0.0%	0.0%
2015														0.0%	-100.0%
2016														0.0%	0.0%
2017								31,250					31,250	0.0%	0.0%

Listings Sold

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013														0.0%	0.0%
2014							1.0						1.0	0.0%	0.0%
2015														0.0%	-100.0%
2016							0.7						0.7	0.0%	0.0%
2017							0.5	0.3	0.3				1.0	0.0%	53.8%

Listings Sold Volume

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013														0.0%	0.0%
2014							72,000						72,000	0.0%	0.0%
2015														0.0%	-100.0%
2016							76,050						76,050	0.0%	0.0%
2017							107,500	31,250	56,250				195,000	0.0%	156.4%

Buy Sales Closed

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013														0.0%	0.0%
2014	2.00			1.00		1.00		1.00			1.00	1.00	7.00	0.0%	0.0%
2015	1.00	3.00	1.00	5.00	2.00	5.00	2.00	2.00	3.00	2.50	2.15	1.10	29.75	0.0%	380.0%
2016	2.20	1.10	1.60	1.10	3.15	3.95	1.20	1.50	2.90	1.10		1.30	21.10	-3.3%	-22.1%
2017	1.20	1.30	0.60	2.60	2.80	2.00	3.00	1.00	2.50				17.00	-13.8%	-9.1%

Buy Sales Closed Volume

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013														0.0%	0.0%
2014	174,000			190,000		150,000		80,700			410,000	104,160	1,108,860	0.0%	0.0%
2015	95,000	329,900	167,000	785,650	400,000	595,900	384,500	279,000	695,000	581,630	606,300	189,200	5,109,080	0.0%	527.5%
2016	346,665	215,600	187,050	323,125	626,395	594,437	200,599	326,050	488,825	308,825		441,700	4,059,271	-29.7%	-11.3%
2017	293,000	315,185	143,700	800,623	462,500	437,000	823,000	330,750	625,250				4,231,008	27.9%	27.9%

Lease Closed

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013														0.0%	0.00
2014														0.0%	0.00
2015														0.0%	0.00
2016														0.0%	0.00
2017														0.0%	0.00

Lease Closed Volume

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013													0	0.0%	0.0%
2014													0	0.0%	0.0%
2015													0	0.0%	0.0%
2016													0	0.0%	0.0%
2017													0	0.0%	0.0%

Contracts Written

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013												1.0	1.0	0.0%	0.0%
2014	1.0	2.0	1.0	1.0	1.0	1.0	1.0			3.0	2.0	1.0	14.0	0.0%	0.0%
2015	2.0	3.0	4.0	6.0	5.0	8.0	5.0	8.0	3.0	7.1	5.3	2.2	58.5	0.0%	450.0%
2016	2.2	1.1	1.7	4.4	1.9	3.0	2.4	4.5	1.1	1.6	1.9		25.5	-63.3%	-49.8%
2017	1.7	1.9	3.7	5.0	4.5	4.0	2.0	2.0	1.3				25.9	13.6%	17.0%

Contracts Written Volume

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013												57,000	57,000	0.0%	0.0%
2014	107,000	330,000	132,000	145,000	55,000	80,700	72,000			893,000	227,000	104,160	2,145,860	0.0%	0.0%
2015	124,900	508,000	626,500	1,010,650	676,900	1,477,500	1,390,900	1,873,000	678,500	2,250,130	962,825	341,000	11,920,805	0.0%	807.8%
2016	382,140	105,050	354,750	769,658	366,100	503,300	502,699	831,275	306,900	273,500	621,200		5,016,572	-54.8%	-50.7%
2017	432,550	637,598	928,000	1,614,000	1,753,500	663,400	375,310	275,750	348,250				7,028,358	13.5%	70.5%

Average Sale Price (exluding leases and referrals)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013														0.0%	0.0%
2014	87,000			190,000		150,000	72,000	80,700				410,000	104,160	0.0%	0.0%
2015	95,000	109,967	167,000	157,130	200,000	119,180	192,250	139,500	231,667	201,087		226,500	262,000	0.0%	0.0%
2016	158,840	196,000	137,750	270,167	202,700	151,112	150,487	218,500	171,500	214,833			317,000	-26.0%	45.9%
2017	240,000	242,450	239,500	307,932	190,200	218,500	310,167	262,167	245,917					43.4%	58.6%

GCI

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013														0.0%	0.0%
2014	5,220			5,529		4,440	2,160	647	1,000	1,000	12,695	3,125	35,816	0.0%	0.0%
2015	2,850	9,172	5,010	22,453	11,880	15,698	11,535	8,370	20,632	17,380	15,747	5,676	146,403	1,963.2%	466.4%
2016	11,629	4,723	5,484	10,530	16,525	16,179	9,463	11,193	12,391	9,364		9,220	116,701	-39.9%	-8.8%
2017	9,204	9,381	4,495	24,019	10,115	12,210	24,604	10,273	19,216				123,516	55.1%	25.9%

Company Dollar

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sep	YOY % Change Sep
2013														0.0%	0.0%
2014	1,566			1,659		1,332	648	194	300	300			5,999	0.0%	0.0%

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sen	YOY % Change Sen
2015											4,724	1,703	6,427	-100.0%	-100.0%
2016	1,073											2,766	3,839	0.0%	0.0%
2017	2,761	1,973											4,734	0.0%	341.1%

Agent 1099 Income

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sen	YOY % Change Sen
2013														0.0%	0.0%
2014	3,341			3,539		2,842	1,382	414	640	640	11,933	2,937	27,668	0.0%	0.0%
2015	2,679	8,622	4,709	21,424	11,880	15,698	11,535	8,370	20,632	17,380	10,078	3,633	136,640	3,123.7%	768.2%
2016	9,858	4,440	5,155	10,126	16,525	16,179	9,463	11,193	12,391	9,364		5,901	110,594	-39.9%	-9.7%
2017	5,890	6,845	4,226	22,957	10,115	12,210	24,604	10,273	19,216				116,335	55.1%	22.0%

Royalty

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sen	YOY % Change Sen
2013														0.0%	0.0%
2014	313			332		266	130	39	60	60	762	187	2,149	0.0%	0.0%
2015	171	550	301	1,029							945	341	3,336	-100.0%	79.9%
2016	698	283	329	404								553	2,268	0.0%	-16.4%
2017	552	563	270	1,062									2,447	0.0%	42.7%

My Tracker - Contacts

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sen	YOY % Change Sen
2013														0.0%	0.0%
2014														0.0%	0.0%
2015														0.0%	0.0%
2016														0.0%	0.0%
2017														0.0%	0.0%

My Tracker - Calls

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sen	YOY % Change Sen
2013														0.0%	0.0%
2014														0.0%	0.0%
2015														0.0%	0.0%
2016														0.0%	0.0%
2017														0.0%	0.0%

My Tracker - Notes

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM % Change Sen	YOY % Change Sen
2013														0.0%	0.0%
2014				1.00									1.00	0.0%	0.0%
2015														0.0%	0.0%
2016														0.0%	0.0%
2017														0.0%	0.0%