

Management Tools/Goal Setting Meeting Form/Brokerage

Goal Setting Meeting

FA: _____ SM: _____ Date: _____

REVIEW OF LAST GSM ACTION STEPS:

Key Metric	Goal	Actual	+/-	New Goal
Contacts				
Appointments Held				
Secured Assets				
Referrals Gained				

Top 5 Prospects	Action Taken	Next Steps	To Be Completed By
1			
2			
3			
4			
5			

OBSERVATIONS:

ACTION STEPS:

1. _____

2. _____

3. _____

EXPECTED HELP FROM SALES MANAGER/ACTION STEPS:

The Next Level Sales Consulting –
Selling is Everyone's Business

Brokerage Industry Financial Advisor Form
SM Signature: _____

FA Signature: _____

Next GSM Date: _____

Time: _____