

# Management Tools/Goal Setting Meeting Form/Mortgage/Account Executive

**GOAL SETTING MEETING ■ ACCOUNT EXECUTIVE**

AE: \_\_\_\_\_ ASM: \_\_\_\_\_ Date: \_\_\_\_\_

Key Metrics	Goal		Actual		Met Y/N	Goals	
	Units	Volume	Units	Volume		Units	Volume
<b>TOTAL APPLICATIONS</b>							
Purchase							
HELD							
Pay Option							
Expanded Criteria							
Super Jumbo							
<b>TOTAL FUNDINGS</b>							
Purchase							
HELD							
Pay Option							
Expanded Criteria							
Super Jumbo							
<b>BP EFFICIENCY (MONTHLY)</b>							
<b>SALES CALLS /PRESENTATIONS</b>							

**OBSERVATIONS:**

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**SMART GOALS / ACTION STEPS:**

1. \_\_\_\_\_

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2. \_\_\_\_\_

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3. \_\_\_\_\_

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**EXPECTED HELP FROM ASM:**

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AE Signature: \_\_\_\_\_ ASM Signature: \_\_\_\_\_

Next GSM Date: \_\_\_\_\_

Time: \_\_\_\_\_