

# 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				
<b>Volume</b>				
<b>BP Efficiency</b>				
Total / Funding BPs				
<b>GSMs</b>				
Field visits with AEs				
# of AEs / BP Calls				
<b>Recruiting</b>				
Phone Contact New / Existing				
Appts Held New / Existing				

**OBSERVATIONS:**

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**ACTION STEPS:**

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

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

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

**EXPECTED HELP FROM SALES MANAGER:**

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

Mortgage Industry Area Sales Manager GSM Form

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

SM Signature: \_\_\_\_\_

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

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