



The goal of the dash Business Planning Platform is to provide assistance to Brokers in defining and exceeding their annual key performance metric and profit goals through strategic business planning.

dash Business Planning Platform

Pre-Use Checklist



*As a franchised broker affiliated with Century 21 Real Estate LLC, you have a variety of resources, tools, technologies and educational opportunities available which are suggested best practices for you to use at your discretion. As an independently owned and operated business, you have sole discretion on all practices and decisions, including those pertaining to recruiting, concerning your business and you should use your own judgment to determine whether the use of these materials is appropriate for you. It is strongly recommended that you consult with your attorney before implementing any office policies or procedures for sales associates who are independent contractors. Nothing in this document is intended to imply or create an employment relationship.

dash Business Planning Platform: Pre-Use Checklist

The goal of the dash Business Planning Platform is to aid Affiliates in defining and exceeding their annual key performance metric and profit goals through strategic business planning. Although the tool will display historic or average data for most of the required figures (allowing you to craft your forecast for your specific goals), to effectively use the system, you may want to gather the following information before logging in as the platform has a time-out feature. To review your historical performance, please utilize the following reports that can be found in the Business Intelligence section of dash: Trend Report, Business Analysis Report, Production Summary Report. You will also need to review your Profit & Loss statement for the Last Twelve Months.

1. START MONTH & YEAR FOR YOUR ANNUAL FORECAST PERIOD: _____

2. IDENTIFY TARGET (GOAL):

Goal

Forecast Goal Type (Choose One)

Total Profit \$

OR

Total Sides

OR

Total Income \$

3. IDENTIFY FORECAST TYPE:

Selection

Forecast Type (Choose One)

Brokerage Sales/Non-Brokerage Sales

OR

Brokerage Sales

OR

Non-Brokerage Sales



4. INCOME:

Verify Reference Period data for the last year or last twelve months in the platform

If there is no Reference Period data in dash, then you need to consider:

Last Year (or last 12 months) GCI Income from Residential Sales

\$ _____

Last Year (or last 12 months) Total Sides Closed (Both Listing and Sales Sides)

Gross Commission Income is calculated by subtracting Real Estate Brokerage Income and Ancillary Income from Total Revenue.

5. COST OF SALES & ANNUAL OPERATING EXPENSES:

	Goal	Goal
Cost of Sales	\$ <input type="text"/>	<input type="text"/> %
Retained Company Dollar	\$ <input type="text"/>	<input type="text"/> %
	Goal	Goal
Advertising	\$ <input type="text"/>	<input type="text"/> %
Sales Promotion	\$ <input type="text"/>	<input type="text"/> %
Wages & Salaries	\$ <input type="text"/>	<input type="text"/> %
Occupancy	\$ <input type="text"/>	<input type="text"/> %
Communications	\$ <input type="text"/>	<input type="text"/> %
Office Expenses	\$ <input type="text"/>	<input type="text"/> %
General & Administrative	\$ <input type="text"/>	<input type="text"/> %
Other Expenses	\$ <input type="text"/>	<input type="text"/> %
Total Operating Expenses	\$ <input type="text"/>	<input type="text"/> %

Reference the standardized Chart of Accounts

The Projected Annual Expenses are how much you expect to spend on your business expenses for a twelve-month period. To calculate these figures, you can either multiply your average monthly expenses by twelve or add up your anticipated actual expenses for each month of the twelve-month period you're projecting



6. ADDITIONAL INCOME:

Goal

Rental Income	\$	<input type="text"/>
Lease Income	\$	<input type="text"/>
Property Management Income	\$	<input type="text"/>
Other Income	\$	<input type="text"/>
Ancillary Income		
BPO/Appraisal Income	\$	<input type="text"/>
Total Insurance Income	\$	<input type="text"/>
Home Warranty Income	\$	<input type="text"/>
Mortgage Income	\$	<input type="text"/>
Transaction Coordinator Fee Income	\$	<input type="text"/>
Admin Fee (Sales Associate)	\$	<input type="text"/>
Copier/Printer Charges (Sales Associate)	\$	<input type="text"/>
Lead Router Fee (Sales Associate)	\$	<input type="text"/>
Advertising Fee (Sales Associate)	\$	<input type="text"/>
Technology Fee (Sales Associate)	\$	<input type="text"/>
Other Misc Income	\$	<input type="text"/>

7. CLOSED:

Goal

Business Forecast Drivers		
Average Sales Price	\$	<input type="text"/>
Average % of Commission per Side		<input type="text"/> %
% of Business that is Buyer Side (open)		<input type="text"/> %
% of Business that is Listing Side (open)		<input type="text"/> %
% of Listings Taken that Contract (open)		<input type="text"/> %
For Tracking Purposes Only		
Average Days to Close a Transaction		<input type="text"/>



8. MISCELLANEOUS:

Goal

Business Forecast Drivers	
Cancellation Rate of Buyer Side	<input type="text"/> %
Cancellation Rate of Seller Side	<input type="text"/> %
For Tracking Purposes Only	
Average Days to Close a Transaction	<input type="text"/>
Office Sq. Feet	<input type="text"/>

9. LISTINGS:

Goal

Business Forecast Drivers	
Listings Taken per Person per Month	<input type="text"/>
For Tracking Purposes Only	
Listing Inventory at Beginning of Period	<input type="text"/>
Expired Listings	<input type="text"/>

10. AGENTS (NET AGENT COUNT):

Goal

Agent Goals (end of year)	<input type="text"/>
---------------------------	----------------------



11. SEASONALITY:

	Listing Seasonality		Open Seasonality		Closed Seasonality	
January	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>	%
February	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>	%
March	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>	%
April	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>	%
May	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>	%
June	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>	%
July	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>	%
August	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>	%
September	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>	%
October	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>	%
November	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>	%
December	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>	%
TOTAL (Must total to 100%)	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>	%

If you have any questions, please reach out to your Brand Ambassador. Should you want or require assistance with building or creating your budget/forecast, please request a Business Planning Engagement with the Business Solutions team.

