

Mastering Inside Sales

Session 14: Financial
Goal Setting

Your Coach(es)

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Please reach out if you have questions regarding the content of the course. If you have administrative questions about your client portal, billing or access, please reach out to fasttrack@kw.com or (512) 439-8684.

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1. Join MAPS on Facebook to stay up to date on all MAPS events and programs:
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2. Only paid participants may listen and contribute.
3. To ask a question you may type your questions into the “Questions” Box.
4. If you would like to speak on the call, click on the hand icon located on your dashboard and the coach will call on you when possible.
5. Complete all assignments prior to call.
6. Be PREPARED!

Notices:

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Objectives

1. Personal goal setting
2. Clarify how to achieve that goal
3. Allocation form explained

I. Goal Setting Mindset

- a. Who do you want to _____ in the next 12 months?
(_____)
- b. What do you want to _____ In the next 12 months?
(_____)
- c. What made you choose those _____?
- d. Are you 100% clear on the commitment and why it's your commitment?

II. Determining Income Commitment

_____ and _____ expenses

+ Taxes (if unsure – check with _____)

= \$ what's needed to _____ -

+ _____ vacation, college fund, debt payoff, etc.

+ Taxes (if unsure – check with _____)

= \$ what's needed to _____

1. Add _____ and _____ together for total income commitment
2. Subtract your _____ and _____
3. Divide average bonus or commission per _____ into
4. How many units needed to _____?

Preparation for Next Week

1 MY AHA'S

2 ASSIGNMENTS

1. Fill out the allocation form for yourself (include ALL expenses)
2. Think bigger – What would you do if you knew you couldn't fail? Write on thrive page
3. Make sure your personal goals align with team standard (or more)