

Evaluation Checklist

To make the best of our time together on the phone, we need to know your company's needs and how you operate. Please complete this questionnaire and fax it toll free to 888-731-2929.

Lucero Summit is a company wide program. It is critical that your company's Owner/President be present for the evaluation. We strongly recommend that all staff involved in the activities listed below be present. Reach Lucero Summit Sales at 800-862-8193 with questions or email us: info@lucerosummit.com

Office Operations

On what kind of commission schedule do you pay your agents?

Graduated Commissions Individually negotiated commission
 100% w/ desk or transaction fees Other
 CGL vs AGL

Have you watched the 7-Minute Overview? Y N

How many 'Producing' Agents does your company have? _____

How many 'Producing' Offices does your company have? _____

How long has your company been operating? _____

What is your current back office software? _____

Do you reduce agents' commissions or take fees for 'company generated leads'? _____

Does your company have a Desk Cost calculated? Y N

What is your current accounting software? _____

Does your company currently have floor time in your office(s)? Y N

Who in your office currently takes lead calls? Circle: agents, call coordinator, both.

Who in your office currently sets showing appointments for co-operating agents?

Circle: Agents, Call Coordinator, or does the Showing Agent call the owner?

Circle those that apply, if any: Do you currently have monthly, quarterly, and/or annual counseling sessions with your agents?

Is your company looking to add offices? Y N

Is your company looking to add agents? Y N

Does your company own or have an affiliation with a title company? Y N

Does your company have a Customer Service Department? Y N

Please rank the importance of each of the following items. 1 is of high importance; 2 is low importance; 3 does not apply or is of no importance:

Modules:

- | | |
|---|---|
| <input type="checkbox"/> Agent Management/Reports | <input type="checkbox"/> Referral Management/Reports |
| <input type="checkbox"/> Listing Management/Reports | <input type="checkbox"/> Franchise Reporting |
| <input type="checkbox"/> Sales Management/Reports | <input type="checkbox"/> Advertising Management/Reports |
| <input type="checkbox"/> Client Contact Management | <input type="checkbox"/> Website Creation/Management |
| <input type="checkbox"/> Automated Commissions | <input type="checkbox"/> Showing Desk Management |
| <input type="checkbox"/> Floor Time Scheduling | <input type="checkbox"/> Agent Billing |
| <input type="checkbox"/> Office Communication | <input type="checkbox"/> Task Management |

Reports:

- | | |
|---|--|
| <input type="checkbox"/> Office Sales Production | <input type="checkbox"/> Agent Ranking |
| <input type="checkbox"/> Agent Production | <input type="checkbox"/> Co-Op Sales Analysis |
| <input type="checkbox"/> Lead Analysis/Sourcing | <input type="checkbox"/> Production Ledger/History |
| <input type="checkbox"/> Referral Production | <input type="checkbox"/> Cash Flow Projections |
| <input type="checkbox"/> Market Activity Analysis | <input type="checkbox"/> Monthly Business Journal |
| <input type="checkbox"/> Contracts: Written/Closed/Canceled | <input type="checkbox"/> Listing Price Analysis |
| <input type="checkbox"/> Graphing Reports | <input type="checkbox"/> Agent Team Reporting |
| <input type="checkbox"/> Multi-Office Reports | <input type="checkbox"/> Office Listing Production |

Discussion

Training:

- | | |
|--|---|
| <input type="checkbox"/> Videos and written guides | <input type="checkbox"/> On-site training |
| <input type="checkbox"/> Monthly User Newsletter | <input type="checkbox"/> Personal Telephone Trainer |
| <input type="checkbox"/> Interactive online training | <input type="checkbox"/> Data evaluation |

HOT topics that you would like to discuss in further detail:

- | | |
|---|--|
| <input type="checkbox"/> Lucero Online - Summit Hosting | <input type="checkbox"/> Multi-Office options |
| <input type="checkbox"/> Networking Lucero | <input type="checkbox"/> Off Site data backup |
| <input type="checkbox"/> Data export | <input type="checkbox"/> Graphing Capabilities |
| <input type="checkbox"/> Custom Report Writing | <input type="checkbox"/> Program Security |
| <input type="checkbox"/> Program upgrades/pricing | <input type="checkbox"/> Support |



Fax

To: _____ Attention: _____

Phone: 800-862-8193 Date: _____

Fax: 888-731-2929

Company Name: _____

Your Name/Position: _____

Phone Number: _____

City, State, Zip: _____

Appointment Date: _____

Appointment Time: _____

Offices: _____ Agents: _____

Owner: _____