

YEAR-END PLANNING

Year-End Numbers Review

The five numbers that tell you what actually happened this year — and what to change next year.

Your numbers tell the story of the year: where you grew, what slowed you down, and what next year's plan should be built on. Five reviews, about ninety minutes, with your MLS report and last year's expenses open in front of you. Do them in December or the first week of January, while the year is still close enough to remember.

Do all five, in order, in one sitting.

Each one feeds the next — production sets the denominator for conversion, and conversion sets the context for what you spent. Picking three at random tells you less than half as much.

1. Sales and production

- Total closed transactions
- Average commission per deal
- Gross commission income

This is overall productivity and income stability in three numbers. A strong GCI on fewer transactions is not a worse year — it usually means a higher average sale price or better negotiation. Compare year over year: if transactions rose but GCI did not, your average price or your commission rate is the thing to look at, not your work rate.

Pull year-to-date figures from your brokerage or MLS report, then keep them in one sheet that totals itself. Re-typing them every quarter is how the habit dies.

2. Listing and market performance

- Average days on market
- List-to-sale price ratio
- Median price and inventory trend in your market

These say how well your listings competed. Faster sales and a higher list-to-sale ratio mean your pricing and presentation are working. Audit every listing that took longer than your own average to sell, and be specific about why — photography, price, or timing. That audit is what your next listing checklist should be built from.

MLS stats or your CMA tool will give you both. Keep a running average per quarter rather than one figure for the year, so a single difficult listing does not hide a trend.

3. Lead generation and conversion

- Leads generated
- Lead-to-client conversion rate
- Referral share against new-lead share

Conversion is a measure of your follow-up system, not of your charm. Referrals cost less and close faster, so a high referral share is evidence that the client experience is working. The two levers that move this are speed of first response and the strength of your past-client relationships — and both are systems problems.

Log every lead by source in the CRM. If you cannot break conversion down by source, you cannot tell which channel is worth more money next year.

4. Digital presence

- Website visitors and email open rate
- Follower growth and engagement rate
- Which content actually performed
- Reviews and testimonials collected

Your digital presence is doing reputation work rather than direct selling, and familiarity is what converts to referrals later. Review the analytics monthly and move budget toward what performed rather than what you enjoyed making. Update landing pages quarterly — a page written for last spring's market reads as neglect.

Meta Business Suite plus your CRM's own reports cover most of this. Record the numbers at month end; they are much harder to reconstruct later.

5. Profit, expenses and return

- Marketing spend against what it produced
- Admin, subscription and tool costs
- Expenses as a share of gross commission income

You cannot scale what you have not measured. The number that matters is not the size of the spend but its share of what you earned, and whether each line can be traced to lead generation or client retention. Audit every tool and every ad channel, then cut or downgrade what cannot be traced to either.

Keep a monthly tracker with four categories — marketing, admin, education, tools — and review it quarterly. Renewal season is October and November, which is exactly when this review happens.

A worked example

One agent's year, to show the shape of it. Your numbers will differ; the relationships between them are the point.

REVIEW	NUMBERS	WHAT IT SAYS
Sales and production	27 closed · \$9,200 average · \$248,400 GCI	A solid mid-size year. The average commission is the number to defend.
Listing performance	28 days on market · 99.1% list-to-sale	Pricing is accurate. Almost nothing was left on the table.

REVIEW	NUMBERS	WHAT IT SAYS
Lead generation	310 leads · 26 clients · 8.4% conversion · 70% referral	The referral share is the real asset here, not the lead count.
Digital presence	2,400 monthly visitors · 41% email open rate	An open rate that high means the list is clean and wants the email.
Profit and return	\$14,800 spent against \$248,400 earned	Expenses at 6.0% of GCI — \$16.78 earned for every \$1 spent.

Check the arithmetic on any number you are handed, including ours.

The version of this that circulated previously reported that last row as “16.7% ROI”, which is not what those two figures describe. \$14,800 against \$248,400 is a 6.0% expense ratio, or a return of roughly 16.8 times the spend. A number quoted the wrong way round makes a good year look like a failing one.

What to do with the five answers

- Write one sentence per review saying what you will do differently. Five sentences is a business plan; a spreadsheet is not.
- Pick the single worst number and make it next year's one target. Improving all five at once is how none of them move.
- Put the same review in the calendar for next December before you close the file, while you still remember how long it took.
- Keep this year's figures somewhere you will find them. The comparison is where the value is, and it only exists from year two onward.



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