

IS THIS TOOL EARNING ITS PLACE?

Give the tool a job.

Pick one tool and one outcome. Complete this page before the test starts.

Team / business

Tool being tested

Test owner

Test start / 90-day review date

01 Connect it to your GPS.

Trevor uses Goals, Priorities, Strategies to connect each test to a business outcome.

Goal: What business result are we working toward?

Priority: What needs to improve to reach that goal?

Strategy: What will this tool help us do differently?

Our test: Who will use it, what will change, and by when?

Example: Agents receive a prepared prospecting list each morning. We aim to reduce list preparation from 45 to 10 minutes per session within 90 days.

IS THIS TOOL EARNING ITS PLACE?

Set the bar before you buy.

Use the same measurement period for costs and results. Choose a primary success path.

02 Count the full test cost.

Subscription and usage fees

Setup or integration fees

Training and setup labor (hours x hourly cost)

Other costs

TOTAL TEST COST

Cancellation / renewal deadline

Cost measurement period

03 Choose how it earns its place.

☐ Generate business

☐ Save time / improve operations

Business path: Choose one revenue basis, such as commission retained by the team after agent and brokerage splits.

Our revenue basis

Target revenue / cost multiple

Required revenue = test cost x multiple

Trevor's benchmark: He described aiming for 7x on some investments, with targets varying by category. Set your own target. Revenue divided by cost is a revenue multiple, not profit.

IS THIS TOOL EARNING ITS PLACE?

Measure what changes.

Establish the baseline, then review progress weekly. Track activity before revenue arrives.

04 Measure time and quality.

Current hours / week

Target hours / week

Actual hours / week

Ongoing tool maintenance: hours per week

Net weekly hours saved

Net hours saved = current hours - actual hours - ongoing maintenance hours.

What will we do with the recovered time?

Quality requirement: What must stay accurate, timely, or complete?

05 Build a small weekly scorecard.

Pick 3-4 measures: attempted contacts, speed to lead, appointments set or held, clients signed, time to close, preparation time, or corrections required.

MEASURE

BASELINE

TARGET

CURRENT

Weekly review owner / day

Where we keep the scorecard

Time saved creates capacity. It becomes a cash saving when it reduces an actual expense.

IS THIS TOOL EARNING ITS PLACE?

Decide with evidence.

Use the 90-day review to keep, change, stop, or extend the test with a clear limit.

06 Make results traceable.

- ☐ Tag leads and closed deals by original source; separate closed revenue from pending business.
- ☐ Avoid counting the same deal's full revenue toward multiple tools.
- ☐ For operations tools, include checking, corrections, and ongoing maintenance time.

Adoption: Trevor recommends using it yourself, demonstrating the benefit, practicing together, and coaching people through their next attempts.

Pilot participants / practice date / what consistent use means

07 Review the result.

Total actual cost

Attributed closed revenue

Revenue / cost multiple

Pending business (separate)

Net hours saved / week

- ☐ Met the quality requirement
- ☐ Keep: met the target
- ☐ Stop: results do not justify cost

- ☐ Used consistently
- ☐ Adjust: fix a specific problem
- ☐ Extend: allow for the sales cycle

Evidence behind the decision

Next action / owner / due date

If extending: review date / spending limit

Adapted from Trevor Amrein's October 8 Keyed In webinar. Worksheet structure and calculations by ListedKit.