

# **PLANNING YOUR BEST YEAR EVER**

A SIMPLE BUSINESS PLAN TO  
GET FOCUSED AND  
ACHIEVE YOUR GOALS

## **What to Do:**

Fill out this business plan and input all of your information, calculate your numbers and set up your year for success.

### **“What You Want” Page:**

In the income goals section, write out the upcoming revenue goals, expenses, expected profit and wealth you plan to input in savings and debt reduction.

Continue to your transaction goal and input the amount of buyers and sellers you need to close to reach your income goal.

Follow this up with the conversations goal section to determine how many hours of power are needed with people you know and don't know to reach your transaction goal.

### **“How to Get It” Pages:**

Circle all processes that will generate and convert leads within the business process section of your business plan.

For lead source, lead generation and lead conversion, please see the “example” plan on the following page if you need further guidance.

### **“Where to Improve” Pages:**

For your personal stability section, rate yourself in each of the six categories with either poor, fair, good or excellent. This will show how prepared you are to carry out your business plan.

Let's get started!

## What You Want:

### Income Goal:

How much money will I produce by carrying out this plan?

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Revenue	Expenses	Profit	Wealth	
Gross Commission Income (GCI)	Reference / Use Expense Tracker	Net Commission Income (NCI)	Reference / Use Wealth Tracker	
<div>\$</div>	<div>\$</div>	<div>\$</div> <div>Revenue - Expenses</div>	<div>Savings Contribution</div> <div>\$</div>	<div>Debt Reduction</div> <div>\$</div>

### Transactions Goal:

How many transactions must I close to reach my income goal?

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Sellers			Buyers		
Percentage of Revenue	Average Sale Price	Average Commission	Percentage of Revenue	Average Sale Price	Average Commission
<div>%</div>	<div>\$</div>	<div>\$</div>	<div>%</div>	<div>\$</div>	<div>\$</div>
Total seller transactions: (Income Goal ÷ Avg. Commission) x Pct. Revenue		<div>#</div>	Total buyer transactions: (Income Goal ÷ Avg. Commission) x Pct. Revenue		<div>#</div>
Total listings taken:		<div>#</div>	Total buyer appointments:		<div>#</div>
Total listing appointments:		<div>#</div>			

## Conversations Goal:

How many conversations must I have to reach my transactions goal?

Performance Indicator		
Anticipate one (1) transaction for every forty (40) business-focused conversations with new leads or database contacts. Bear in mind that results may vary subject to skills and performance.		
Annual Quota	Weekly Quota	Daily Quota
# _____	# _____	# _____
Transaction Goal x 40	Annual Quota ÷ Weeks Worked	Annual Quota ÷ Days Worked
- HOUR OF POWER -		
With People I Know	With People I Don't Know	
# _____	# _____	
Daily Quota ÷ 2	Daily Quota ÷ 2	

## Why You Want It: Driving Force

What are your reasons for following through?

A central graphic featuring a blue circle with the word "WHY" in white. This circle is surrounded by a grid of lines and dots, designed for writing reasons for following through.

If I Succeed

- 
- 
- 
- 

If I Fail

- 
- 
- 
- 

"When your WHY is big enough, you will find  
your how."

LES BROWN

# Transaction Tracker

Where have previous transactions come from?

Lead Sources	CY Sellers	CY Buyers	CY Leases	CY Refers	FY Sellers	FY Buyers	FY Leases	FY Refers	Notes
Past Clients (PC)	#	#	#	#	#	#	#	#	•
Center of Influence (COI)	#	#	#	#	#	#	#	#	•
For Sale By Owners (FSBO)	#	#	#	#	#	#	#	#	•
Expired Listings	#	#	#	#	#	#	#	#	•
Make Me Move (MMM)	#	#	#	#	#	#	#	#	•
Geographic Farm (GF)	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
Online Leads	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
Social Networks	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
Banks	#	#	#	#	#	#	#	#	•
Builders/Developers	#	#	#	#	#	#	#	#	•
Distribution List	#	#	#	#	#	#	#	#	•
Investors	#	#	#	#	#	#	#	#	•
Agents	#	#	#	#	#	#	#	#	•
Vendors	#	#	#	#	#	#	#	#	•
Demographic Farm	#	#	#	#	#	#	#	#	•
Clubs/Committees	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
Absentee Owners	#	#	#	#	#	#	#	#	•
Distressed Owners	#	#	#	#	#	#	#	#	•
Relocation	#	#	#	#	#	#	#	#	•
New Construction Walk-ins	#	#	#	#	#	#	#	#	•
Open Houses	#	#	#	#	#	#	#	#	•
Conditional Farm	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
Sum Total	#	#	#	#	#	#	#	#	

CY (Current Year) • FY (Future Year)

# Where to Improve: Self Assessment

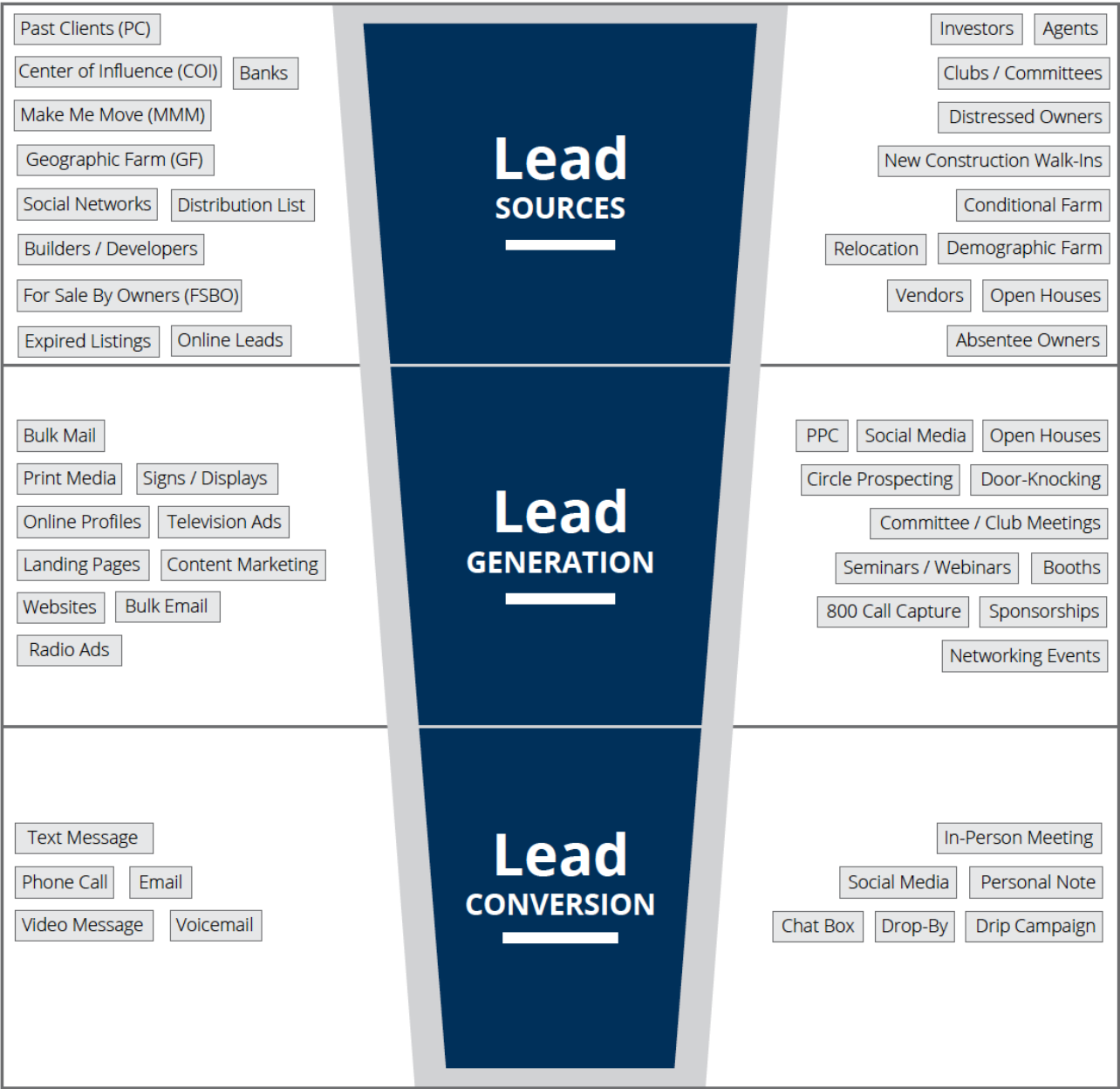
Rate yourself in the following areas

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The chart is a circular self-assessment tool. It features a central dark blue circle. Surrounding this center are four concentric rings, each representing a performance level: EXCELLENT (outermost), GOOD, FAIR, and POOR (innermost). The chart is divided into six equal segments by radial lines. Each segment is labeled with a skill area: Lead Generation (top), Organizational Skills (top-right), Wellness (bottom-right), Lead Conversion (bottom), Mindset (bottom-left), and Communication Skills (top-left). The labels are positioned outside the circle, with horizontal lines separating them from the chart area.

# How to Get It: Business Process

What process will we follow to generate and convert leads?



# How to Get It: Lead Sources

What audience(s) will I target for business?

Target Audience
<ul style="list-style-type: none"><li>• Geographic Farm (GF) - Rolling Mill Estates (500 Residences)</li></ul>

## Lead Generation:

How will I generate leads from this target audience?

Marketing Plan	Networking Plan	Prospecting Plan
Advertising to create awareness & consideration	Socializing to foster referral-producing relationships	Contacting a group of people in search of leads
<ul style="list-style-type: none"><li>• 24 open houses (OH) (semi-monthly)</li><li>• 24 OH neighborhood previews (semi-monthly)</li><li>• 12 bulk mailers (monthly)</li><li>• Targeted FB videos (monthly)</li><li>• FB home valuation ads (weekly)</li><li>• FB home search ads (weekly)</li></ul>	<ul style="list-style-type: none"><li>• Annual community event booth</li><li>• PTA board meetings</li><li>• Community bus. assoc. meetings</li><li>• Community FB group involvement</li></ul>	<ul style="list-style-type: none"><li>• OH neighbor invites (semi-monthly)</li><li>• Circle prospecting (3 days/week)</li><li>• Door-knocking (2 days/week)</li><li>• Purchase Zillow/Trulia leads in GF</li></ul>

# Lead Conversion:

What actions will I take to get conversations?

## Follow-Up Plan

Repeated communication with non-responsive leads aimed to elicit conversation

- Zillow/Trulia zip code lead follow-up plans
- FB seller follow-up plan
- FB buyer follow-up plan
- Resident inquiry follow-up plan
- OH sign-ins follow-up plan

## Nurturing Plan

Repeated communication with responsive leads aimed to set appointments

- Zillow/Trulia zip code lead nurture plans
- FB seller nurture plan
- FB buyer nurture plan
- Resident seller nurture plan

## How to Get It: Lead Sources

## What audience(s) will I target for business?

## Target Audience

- Past Clients + Center of Influence (PC/COI)

## Lead Generation:

## How will I generate leads from this target audience?

## Marketing Plan

Advertising to create awareness & consideration

- 24 open houses (OH) (semi-monthly)
- 24 OH neighborhood previews (semi-monthly)

## Networking Plan

### Socializing to foster referral-producing relationships

- 1 holiday event (annually)

## Prospecting Plan

### Contacting a group of people in search of leads

- 4 personal phone calls (quarterly)
- 2 FB touches (semi-annually)

## Lead Conversion:

## What actions will I take to get conversations?

## Follow-Up Plan

Repeated communication with non-responsive leads aimed to elicit conversation

- Reference / use referral/repeat lead follow-up plan

## Nurturing Plan

Repeated communication with responsive leads aimed to set appointments

- Reference / use referral/repeat nurture plan

## How to Get It: Lead Sources

## What audience(s) will I target for business?

## Target Audience

---

## Lead Generation:

## How will I generate leads from this target audience?

## Marketing Plan

Advertising to create awareness & consideration

[illegible]

## Networking Plan

### Socializing to foster referral-producing relationships

[illegible]

## Prospecting Plan

Contacting a group of people in search of leads

[illegible]

## Lead Conversion:

## What actions will I take to get conversations?

## Follow-Up Plan

Repeated communication with non-responsive leads aimed to elicit conversation

[illegible]

## Nurturing Plan

### Repeated communication with responsive leads aimed to set appointments

[illegible]

# Single Page Business Plan

## ANNUAL GOAL

### 36 CLOSINGS

#### 3 Key Focus Areas

**Focus Area #1: Establish Online Presence**

**Focus Area #2: Lead Generate for New Business Daily**

**Focus Area #3: Organize COI (Center of Influence) in CRM Database**

#### 5 Objectives for Each Focus Area

#1: Online Presence	#2: Lead Generate	#3: COI Database
5 Objectives	5 Objectives	5 Objectives
Set up and/or update all social media profiles. Confirm website has links to my social media accounts.	Lead generate every Monday – Friday for three hours (9 am – Noon). Contact COI, FSBO's, Expireds and other targeted lead sources.	Contact family, friends, past clients and leads to get updates to contact information. Friend as needed on Facebook.
Create content calendar/plan for posting on each relevant social media platform.	Meet with accountability partner every week to hold me accountable to my goals.	Contact 50 people per week until speaking with each person and updated information is confirmed.
Create single property listing websites for listings.	Be consistent and disciplined with my calendar. Time block lead generation. Role play scripts.	Enter all contacts in Database/CRM. Add 10 new contacts per week to CRM.  Attend CRM training to optimize.
Create dedicated landing pages for target market, i.e., sellers, buyers, FTHB, investor.	Obtain 3 new listings, 3 buyer contracts and 3 closed transactions per month.	Set up tasks, reminders and contact touch campaigns in CRM.
Attend 3 training courses on social media and internet leads.	Obtain and post client testimonials and post as online reviews.	Handwritten "Thank You" past COI, past clients, affiliates, and people of influence.

Single Page Business Plan

ANNUAL GOAL

3 Key Focus Areas

Focus Area #1:  
Focus Area #2:  
Focus Area #3:

5 Objectives for Each Focus Area

#1:

#2:

#3:

5 Objectives

5 Objectives

5 Objectives


# When it Happens: Optimal Day

What does my day look like to take action?

Time	Activity Description	
4 AM		
5 AM		
6 AM		
7 AM		
8 AM		
9 AM		
10 AM		
11 AM		
12 PM		
1 PM		
2 PM		
3 PM		
4 PM		
5 PM		
6 PM		

## When it Happens: Optimal Week

What does my week look like to follow through?

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Time	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
4 - 6 AM							
6 - 8 AM							
8 - 10 AM							
10 - 12 PM							
12 - 2 PM							
2 - 4 PM							
4 - 6 PM							
6 - 8 PM							
8 - 10 PM							

## What marketing will I do to generate leads?

[illegible]

## Marketing Tracker: Activity Schedule

## What marketing will I do to generate leads?

[illegible]

# Expense Tracker

What are the total costs to operate your life?

Expenses	CY Monthly Cost	CY Annual Cost	FY Monthly Cost	FY Annual Cost	Notes
Child Care	\$	\$	\$	\$	•
Child Tuition	\$	\$	\$	\$	•
Debts - Back Taxes	\$	\$	\$	\$	•
Debts - Credit Card(s)	\$	\$	\$	\$	•
Debts - Household	\$	\$	\$	\$	•
Debts - Legal	\$	\$	\$	\$	•
Debts - Medical	\$	\$	\$	\$	•
Donations	\$	\$	\$	\$	•
Dry Cleaners/Laundry	\$	\$	\$	\$	•
Groceries	\$	\$	\$	\$	•
Health Supplies/Supplements	\$	\$	\$	\$	•
Household Supplies	\$	\$	\$	\$	•
Insurance - Auto	\$	\$	\$	\$	•
Insurance - Health	\$	\$	\$	\$	•
Insurance - Home	\$	\$	\$	\$	•
Insurance - Life	\$	\$	\$	\$	•
Investments Account(s)	\$	\$	\$	\$	•
Loans - Bank(s)	\$	\$	\$	\$	•
Loans - Mortgage(s)	\$	\$	\$	\$	•
Loans - Personal	\$	\$	\$	\$	•
Loans - Student	\$	\$	\$	\$	•
Loans - Vehicle(s)	\$	\$	\$	\$	•
Personal Coaching	\$	\$	\$	\$	•
Personal Gifts	\$	\$	\$	\$	•
Personal Hygiene/Care	\$	\$	\$	\$	•
Personal Rent(s)	\$	\$	\$	\$	•
Personal Subscriptions	\$	\$	\$	\$	•
Personal Taxes	\$	\$	\$	\$	•
Personal Travel	\$	\$	\$	\$	•
Pets	\$	\$	\$	\$	•
Restaurants	\$	\$	\$	\$	•
Utilities - Cable/Internet	\$	\$	\$	\$	•
Utilities - Gas/Electric	\$	\$	\$	\$	•
Utilities - Phone(s)	\$	\$	\$	\$	•
Utilities - Trash/Recycling	\$	\$	\$	\$	•
Utilities - Water	\$	\$	\$	\$	•
Vehicles - Gasoline	\$	\$	\$	\$	•
Vehicles - Parking/Tolls	\$	\$	\$	\$	•
•	\$	\$	\$	\$	•
<b>Sum Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	

CY (Current Year) • FY (Future Year)

## What are the operating costs for your business?

CY (Current Year) • FY (Future Year)

What is value of what you own minus debts?

[illegible]

“

**THERE IS  
NO MAGIC**

**IN MAGIC.**

**IT'S ALL IN  
THE  
DETAILS.**

**WALT DISNEY**

”

# NOTES