

A photograph of a business meeting. In the foreground, a desk is covered with various business documents, including bar charts, pie charts, and several colorful sticky notes (yellow, pink, blue, green). In the background, three people in business attire are visible. One person in a blue suit is on the left, another in a red suit is in the center, and a third in a grey suit with a striped tie is on the right. The person in the red suit is pointing at a document on the desk. The overall scene is brightly lit and professional.

# 2024 BUSINESS PLAN

The logo for AgentsBoost, featuring a stylized white and red swoosh that curves around the text.

**Wade Webb's**  
**AGENTSBOOST**  
IMPACT - EMPOWER - IMPROVE

[www.AgentsBoost.com](http://www.AgentsBoost.com)

ABOVE THE LINE  
**ACCOUNTABILITY**

**ACTIONS**

**SOLUTIONS**

**OWNERSHIP**

**ENVISION**

**THE LINE**

HELPLESS

PASSIVE

EXCUSES

DENIAL

BELOW THE LINE

**VICTIM**

BLAME

Individual results of people improve dramatically when people overcome the deceptive traps of the victim cycle and the Steps To Accountability.

# YOUR PERSONALIZED **BUSINESS PLAN 2024**

- REFLECTION
- MARKET ANALYSIS
- PROJECTION
- STRATEGIES & TACTICS
- ACTION STEPS
- MEASUREMENT

FACT: LESS THAN 3% OF REAL ESTATE AGENTS  
HAVE A BUSINESS PLAN

FACT: ESTIMATED 3% OF REAL ESTATE AGENTS IN  
NORTH AMERICA DOING 97% OF BUSINESS

**PLAN YOUR WORK AND WORK YOUR PLAN**



# REALITY CHECK

Are you moving closer or further from your goals and dreams?

1. Do you feel you have a solid strategy or plan in place that will move you in the direction of your goals?  YES  NO  SOMEWHAT
2. Are you living your life and/or building your business by design, on your terms rather than by default and taking things as they come?  YES  NO  SOMEWHAT
3. Do you live and work proactively? (As opposed to being reactive)  YES  NO  SOMEWHAT
4. If you continue to think, act and behave in the same manner you have been in the past few years, will you be happy?  YES  NO  SOMEWHAT
5. Did you implement the ideas and strategies you learned in the last year?  YES  NO  SOMEWHAT
6. Are you well organized and focused on what's important to get things done?  YES  NO  SOMEWHAT
7. Are you satisfied with the amount of time you spend with your family and friends and feel balanced in your life?  YES  NO  SOMEWHAT
8. Are you satisfied with your income?  YES  NO  SOMEWHAT
9. Do you know what you are passionate about?  YES  NO  SOMEWHAT
10. Do you know your greatest strengths and unique talents?  YES  NO  SOMEWHAT

TOTAL: \_\_\_\_\_ YES \_\_\_\_\_ NO \_\_\_\_\_ SOMEWHAT



# BUSINESS ASSESSMENT

Take an assessment of areas for opportunity and growth in order to be more effective in your business. Please take a few minutes to answer the following questions.

**10= Good**

**5 = Fair**

**1= Poor**

1 2 3 4 5 6 7 8 9 10

Handling Objections, Stalls and Conditions?

1 2 3 4 5 6 7 8 9 10

Negotiation Skills?

1 2 3 4 5 6 7 8 9 10

Closing Skills?

1 2 3 4 5 6 7 8 9 10

Converting Prospects Face To Face Appointments?

1 2 3 4 5 6 7 8 9 10

Buyer Counselling (consistent follow up, contact, communication)?

1 2 3 4 5 6 7 8 9 10

Seller Counselling (consistent follow up, contact, communication)?

1 2 3 4 5 6 7 8 9 10

Questioning Skills?

1 2 3 4 5 6 7 8 9 10

Listing Appointment Skills?

1 2 3 4 5 6 7 8 9 10

Buyer Appointment Skills?

1 2 3 4 5 6 7 8 9 10

Pre Listing Package?

1 2 3 4 5 6 7 8 9 10

Pre Buyer Package?

1 2 3 4 5 6 7 8 9 10

Powerful Listing Presentation?

1 2 3 4 5 6 7 8 9 10

Powerful Pricing Presentation?

1 2 3 4 5 6 7 8 9 10

Powerful Buyer Presentation?

1 2 3 4 5 6 7 8 9 10

Systems. Checklists?

1 2 3 4 5 6 7 8 9 10

Lead Generation (steady stream of buyer and seller leads coming in)?

1 2 3 4 5 6 7 8 9 10

Lead Conversion (add value, help, wow them, until they put their hand up wanting my help)?

1 2 3 4 5 6 7 8 9 10

Lead Follow up? (Follow them up until they buy or sell average 10 months)?

1 2 3 4 5 6 7 8 9 10

Work Life Balance?

1 2 3 4 5 6 7 8 9 10

Leveraging. Do I do it? Delegate? Systemize Automate? Dump?

1 2 3 4 5 6 7 8 9 10

Daily, Weekly Activity Plans?

1 2 3 4 5 6 7 8 9 10

Finances? Personal and business. Profit?

# LIFE ASSESSMENT WORKSHEET

## FACE THE TRUTH:

There are no wrong answers, there is no grade, no rating, not even an interpretation of your response other than your own thoughtful assessment. Be honest and truthful with yourself. Even when the truthful response is a little embarrassing or painful, remember that no one else need ever see it and that you never succeed by deceiving yourself.

Rate the following on a scale of 1 to 5, 1 being Least True and 5 being Most True:

RELATIONSHIP & FAMILY	
I spend at least 10 hours of focused time with my family each week.	1 2 3 4 5
I get together with friends at least once a week.	1 2 3 4 5
There is no one in my life that I haven't completely forgiven.	1 2 3 4 5
I am actively engaged in learning how to be a better spouse, parent and/or friend.	1 2 3 4 5
I actively look for ways to support and help advance the success of my friends and family.	1 2 3 4 5
I take complete responsibility for all relationship conflicts when they arise.	1 2 3 4 5
I easily trust those I live and work with.	1 2 3 4 5
I am 100% honest and open with all those I live and work with.	1 2 3 4 5
It is easy for me to commit to others and honour those commitments.	1 2 3 4 5
I recognize when I need support and am continually seeking help.	1 2 3 4 5
<b>Total Score:</b>	

PHYSICAL	
I do strength training at least 3x a week	1 2 3 4 5
I do cardiovascular exercise at least 3x a week.	1 2 3 4 5
I do stretching and /or Yoga type exercise at least 3x a week.	1 2 3 4 5
During a typical day, I watch no more than 1 hour of TV	1 2 3 4 5
I eat breakfast (more than just coffee) every day.	1 2 3 4 5
I don't eat fast food, ever.	1 2 3 4 5
I spend time outside for at least 30 minutes a day, every day.	1 2 3 4 5
I have undisturbed sleep for at least 8 hours each night.	1 2 3 4 5
I don't drink more than 1 caffeinated beverage per day.	1 2 3 4 5
I drink at least 8 glasses of water per day.	1 2 3 4 5
<b>Total Score:</b>	

<b>BUSINESS</b>	
I plan my day out the day before	1 2 3 4 5
My goals are written, prominently displayed and regularly reviewed.	1 2 3 4 5
I love what I do and enjoy getting up every day to do my job.	1 2 3 4 5
I am continually filled with feelings of accomplishment and satisfaction from my work.	1 2 3 4 5
I am constantly improving my professional strengths and weaknesses.	1 2 3 4 5
If I could, I would still do my job without pay.	1 2 3 4 5
I am home with my family on time every day.	1 2 3 4 5
My current business/job has the realistic potential of accomplishing all my financial goals for the next year.	1 2 3 4 5
My current business/job has the realistic potential of accomplishing all my financial goals for the next 10 years.	1 2 3 4 5
My current business/job give me a feeling of significance as it makes a positive difference in the lives of others.	1 2 3 4 5
<b>Total Score:</b>	

<b>FINANCIAL</b>	
I have a completely detailed budget and unfailingly stick to it.	1 2 3 4 5
I have a professional designed and diversified financial portfolio.	1 2 3 4 5
I save at least 10% of my income every month.	1 2 3 4 5
I am credit card debt-free.	1 2 3 4 5
I have a dedicated six-month reserve account completely funded and set aside.	1 2 3 4 5
I feel that I am compensated completely according to my worth.	1 2 3 4 5
I have an updated and complete last will and testament.	1 2 3 4 5
I have the needed insurance and financial plan in place for my family should something happen to me.	1 2 3 4 5
I have a detailed retirement plan that will accommodate exactly what I need to live as I desire after retirement and for the rest of my life.	1 2 3 4 5
I live well below my means and never spend money imprudently.	1 2 3 4 5
<b>Total Score:</b>	

<b>SPIRITUAL</b>	
I consider myself a spiritual person.	1 2 3 4 5
I take at least 20 minutes each day to meditate and reflect on my life.	1 2 3 4 5
Others who experience me would consider me a spiritual person.	1 2 3 4 5
I have a personal relationship with my spiritual source.	1 2 3 4 5
I study my spiritual beliefs daily.	1 2 3 4 5
I practice my spiritual beliefs daily.	1 2 3 4 5
I teach my spiritual beliefs daily.	1 2 3 4 5
I live completely in accordance to my spiritual beliefs	1 2 3 4 5
I consistently use my spirituality to help resolve my problems.	1 2 3 4 5
I consistently use my spirituality to help others.	1 2 3 4 5
<b>Total Score:</b>	

<b>MENTAL</b>	
I read something instructional or inspirational for at least 30 minutes each day.	1 2 3 4 5
I listen to something instructional or inspirational for at least 30 minutes each day.	1 2 3 4 5
I stay completely current with my industry news.	1 2 3 4 5
I seek instructional information in my field every day.	1 2 3 4 5
I have a mentor whom I trust.	1 2 3 4 5
All my friends are a positive influence in my life.	1 2 3 4 5
I never engage in gossip.	1 2 3 4 5
I review my major goals every day.	1 2 3 4 5
I review what I am grateful for every day.	1 2 3 4 5
I always say no to requests or obligations that don't fit my core values or objectives.	1 2 3 4 5
<b>Total Score:</b>	



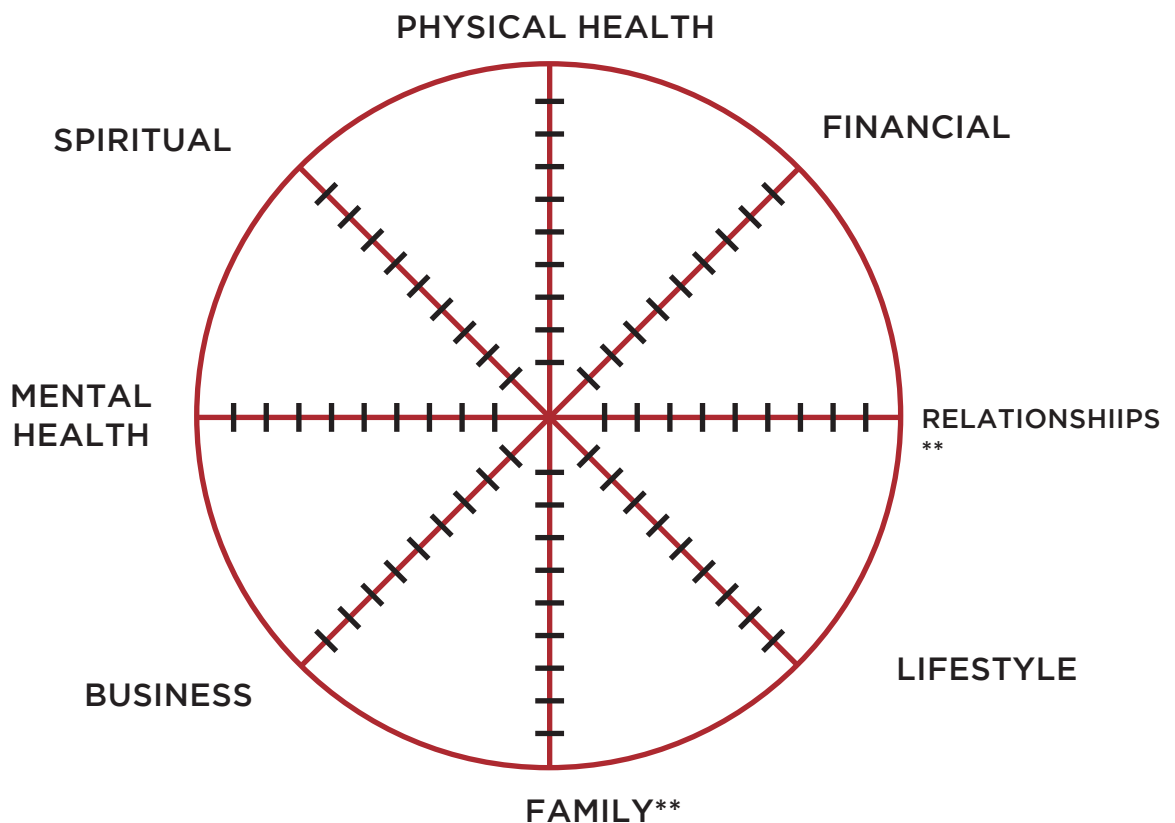
LIFESTYLE	
I have hobbies outside of work that I enjoy and take part in at least 3 times a week.	1 2 3 4 5
I attend cultural events (e.g.,opera, museums, theatre) at least 2 times a month.	1 2 3 4 5
I vacation at least once a year with no work communications.	1 2 3 4 5
I spend as much time as I want with my family.	1 2 3 4 5
I spend as much time as I want with my friends.	1 2 3 4 5
I am constantly seeking adventure, trying something new and creating diverse experiences.	1 2 3 4 5
I feel like there is enough time in the day to do what I both need and want to do.	1 2 3 4 5
I live life to the fullest every day.	1 2 3 4 5
I take time out to daydream every day.	1 2 3 4 5
I am completely present in every moment of every day.	1 2 3 4 5
<b>Total Score:</b>	

### THE WHEEL OF LIFE

To determine your current balance sheet of your life, take the scores from the previous pages and plot them on the wheel below. Start from the centre and use the key to mark your current status. Then connect all the dots and you will see how balanced your wheel is or isn't.

KEY:  
 Score of 5 = 1 notch  
 6 -10 = 2 notches  
 11-15 = 3 notches  
 16 -20 = 4 notches  
 21 -25 = 5 notches  
 26 -30 = 6 notches  
 31 -35 = 7 notches  
 36 -40 = 8 notches  
 41 -45 = 9 notches  
 46 -50 = 10 notches

\*\*use the same score on both the Family & Relationship line.



# S.W.O.T. ANALYSIS

YOU, YOUR BUSINESS, YOUR MARKET

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

# EXERCISE: CORE VALUES

NARROW THE CORE VALUES BELOW TO THE TOP 5 THAT ARE MOST IMPORTANT TO YOU.

<b>COMMITMENT</b> To make enduring, meaningful commitments	<b>COOPERATION</b> To work collaboratively with others	<b>INTIMACY</b> To share my innermost experiences with others	<b>SOLITUDE</b> To have time and space where I can be away from others	<b>KNOWLEDGE</b> To learn and contribute valuable knowledge	<b>CONTRIBUTION</b> To make a lasting contribution in the world	<b>PASSION</b> To have deep feeling about ideas, activities, or people
<b>FORGIVENESS</b> To be forgiving of others	<b>SELF-CONTROL</b> To be disciplined in my own actions	<b>SERVICE</b> To be of service to others	<b>JUSTICE</b> To promote fair and equal treatment for all	<b>INDUSTRY</b> To work hard and well at my life tasks	<b>BEAUTY</b> To appreciate beauty around me	<b>DUTY</b> To carry out my duties and obligations
<b>FLEXIBILITY</b> To adjust to new circumstances easily	<b>ACCURACY</b> To be accurate in my opinions and beliefs	<b>CREATIVITY</b> To have new and original ideas	<b>WEALTH</b> To have plenty of money	<b>COMPASSION</b> To feel and act on concern of others	<b>EXCITEMENT</b> To have a life full of thrills and stimulation	<b>HONESTY</b> To be honest and truthful
<b>CARING</b> To take care of others	<b>SAFETY</b> To be safe and secure	<b>ACCEPTANCE</b> To be accepted as I am	<b>HELPLESSNESS</b> To be helpful to others	<b>LOVING</b> To give love to others	<b>PLEASURE</b> To feel good	<b>FUN</b> To play and have fun
<b>CHALLENGE</b> To take on difficult tasks and problems	<b>FITNESS</b> To be physically fit and strong	<b>ATTRACTIVENESS</b> To be physically attractive	<b>ECOLOGY</b> To live in harmony with the environment	<b>SIMPLICITY</b> To live life simply, with minimal needs	<b>COURTESY</b> To be considerate and polite toward others	<b>WORLD PEACE</b> To work to promote peace in the world
<b>NON-CONFORMITY</b> To question and challenge authority and norms	<b>ORDER</b> To have a life that is well-ordered and organized	<b>GENUINENESS</b> To act in a manner that is true to who I am	<b>SELF-KNOWLEDGE</b> To have a deep and honest understanding of myself	<b>FOCUS</b> The ability to concentrate on my top priorities	<b>REALISM</b> To see and act realistically and practically	<b>HUMOR</b> To see the humorous side of myself and the world
<b>AUTHORITY</b> To be in charge of and responsible for others	<b>POWER</b> To have control over others	<b>FAME</b> To be known and recognized	<b>POPULARITY</b> To be well-liked by many people	<b>MODERATION</b> To avoid excesses and find middle ground	<b>STABILITY</b> To have a life that stays fairly consistent	<b>FRIENDSHIP</b> To have close, supportive friends
<b>VIRTUE</b> To live a morally pure and excellent life	<b>HEALTH</b> To be physically well and healthy	<b>INNER PEACE</b> To experience personal peace	<b>GROWTH</b> To keep changing and growing	<b>PURPOSE</b> To have meaning and direction in my life	<b>FAMILY</b> To have a happy, loving family	<b>RESPONSIBILITY</b> To make and carry out responsible decisions
<b>MASTERY</b> To be competent in my everyday activities	<b>LOVED</b> To be loved by those close to me	<b>MONOGAMY</b> To have one close, loving relationship	<b>FAITHFULNESS</b> To be loyal and true in relationships	<b>COMFORT</b> To have a pleasant and comfortable life	<b>DEPENDABILITY</b> To be reliable and trustworthy	<b>HOPE</b> To maintain a positive and optimistic outlook
<b>LEISURE</b> To take time to relax and enjoy	<b>NURTURANCE</b> To take care of and nurture others	<b>SELF-ESTEEM</b> To feel good about myself	<b>RATIONALITY</b> To be guided by reason and logic	<b>GENEROSITY</b> To give what I have to others	<b>SELF-ACCEPTANCE</b> To accept myself as I am	<b>CHANGE</b> To have a life full of change and variety
<b>TOLERANCE</b> To accept and respect those who differ from me	<b>SEXUALITY</b> To have an active and satisfying sex life	<b>MINDFULNESS</b> To live conscious and mindful of the present moment	<b>OPENESS</b> To be open to new experiences, ideas and options	<b>ROMANCE</b> To have intense, exciting love in my life	<b>INDEPENDENCE</b> To be free from dependence on others	<b>ACHIEVEMENT</b> To have important accomplishments
<b>ADVENTURE</b> To have new and exciting experiences	<b>TRADITION</b> To follow respected patterns of the past	<b>RISK</b> To take risks and chances	<b>GOD'S WILL</b> To seek and obey the will of God	<b>AUTONOMY</b> To be self-determined and independent	<b>HUMILITY</b> To be modest and unassuming	<b>SPIRITUALITY</b> To grow and mature spiritually

# MISSION STATEMENT

## WRITING A MISSION STATEMENT

One of the hardest things for people to write in a business plan is the mission statement. Mission statements can tell a lot about your business, so it's important to take time, look at some mission statement examples and put effort into writing a good one.

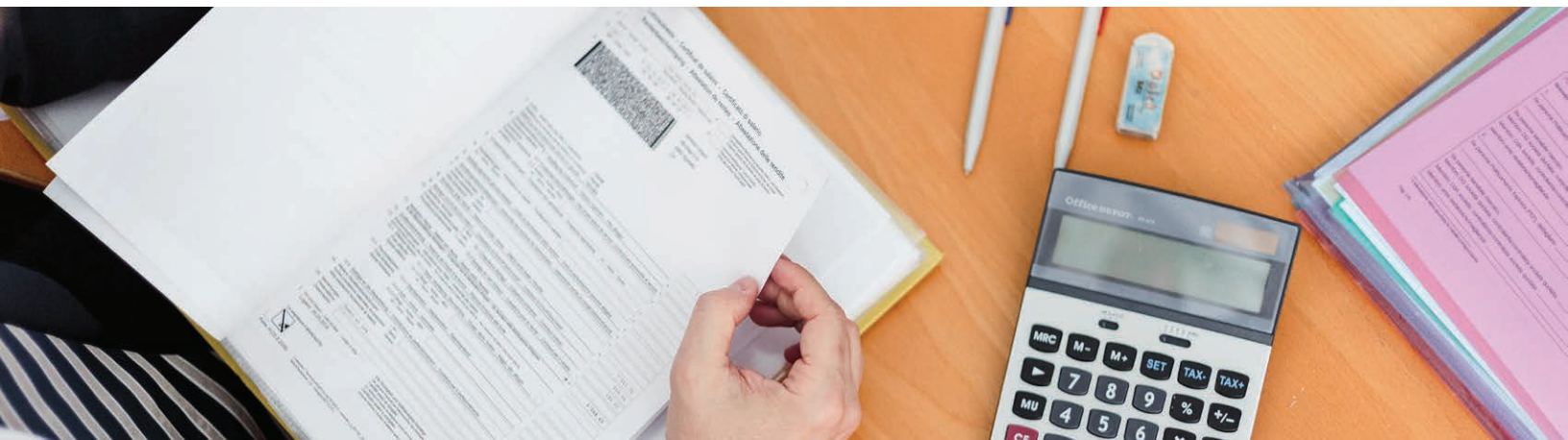
## WHAT IS A MISSION STATEMENT?

You should think of a mission statement as a cross between a slogan and an executive summary. Just as slogans and executive summaries can be used in many ways, so too can a mission statement. An effective mission statement should be able to tell your company story and ideals in less than 30 seconds.

## HOW SHOULD I WRITE A MISSION STATEMENT?

Here are some basic guidelines in writing a mission statement:

- A mission statement should say who your company is, what you do, what you stand for and why you do it.
- An effective mission statement is best developed with input by all the members of an organization
- The best mission statements tend to be 3-4 sentences long.
- Avoid saying how great you are, what great quality and what great service you provide
- Examine other company's mission statements, but make certain your statement is yours and not some other company. That is why you should not copy a statement
- Make sure you actually believe in your mission statement, if you don't, it's a lie and your customers will soon realize it.





# COMPONENTS OF **EFFECTIVE GOALS**

TOTAL CLARITY OF DESIRED OUTCOME  
WRITTEN DOWN AND VISUALIZED  
MUST BE A CHALLENGE  
MUST BE IDENTIFIABLE  
WITHIN YOUR BELIEF SYSTEM  
MUST HAVE A DEADLINE  
MUST BE REALISTIC / DOABLE



# MARKET ANALYSIS

- Average price? Up? Down? Stable?
- Median price? Up Down? Stable?
- DOM ( average days on market board area)
- Asking Price List Price to Sell Price
- Listings taken vs Listings sold ( expiry rate )
- Total sales ( all types, SF, Multi, RF, Farm Acreage )
- Total listings
- Top price ranges ( top 3-5 price ranges)
- Top product property types  
(Top 3 - SF, townhome, condo, acreage, waterfront, luxury, duplex)
- Top areas neighborhoods ( top 3-5 )
- Top Demographics driving market ( millennial, gen x, boomer, senior)
- Top buyer types ( investor, first time, acreage, high end, commercial, move up, down size )
- Top months for sales
- Top months for listings
- Where are they coming from ( Local, Vancouver, Alberta, International )
- Trends for 2024 predictions
- Where is the market next year trending
- Where should we focus our business next year 2024

## STATS YOU MUST KNOW

- Total active residential listings
- Compared to same time last year
- Average List Price YTD
- Average Days on Market YTD
- Compared to same time last year
- List Price vs. Sale Price Ratio YTD
- Compared to same time last year
- Number of sales YTD
- Average Sale Price YTD
- Compared to same time last year
- Overall Depreciation - Appreciation
- Number of Expired Listings
- Number of Months of Supply
- Prime Interest Rate



# YOUR BUSINESS ANALYSIS

- My Average price
- My Median price
- My DOM (average Days on market)
- List Price to Sell Price % { sellers net? Buyers% off asking? }
- Listings taken vs Listings sold { expiry}
- Total sales { price, product, location }
- Total listings
- Listings taken vs sold
- List price to sale price
- % with Buyers
- % with Sellers
- Top price ranges { top 3 price points}
- Top product types (SF, townhome, condo, acreage, waterfront, luxury, duplex)
- Top areas neighborhoods
- Top Demographics driving market { millennial, gen x, boomer, senior}
- Top buyer types { investor, first time, acreage, high end, commercial, move up, down size }
- Top months for sales
- Top months for listings
- Sources ( open, sphere, online, tell 20, floor, etc. )
- Average commission per deal
- Average sale price
- Commission cuts { how much did we cut this year \$\$ }
- Referrals {paid out, received, agent or personal}

# WHERE HAS YOUR BUSINESS COME FROM?

	BUYERS	SELLERS
Sphere of Influence / Past Client / Referral		
Expired		
FSBOs		
Farm		
Tell 20		
Foreclosure / Short Sale		
Open House		
Print Ad		
Seminar		
Agent Referral		
Relocations		
Sign Call		
Kiosk		
Your Website / Blog		
Lead Generation Site		
Social Media		
Direct Mail		
Investor		
Ancillary Service		
Other		

# WHAT IS YOUR VALUE PER HOUR

## FORMULA:

Gross Commission Earned  
-Expenses  

---

Net Annual Income

Net Annual Income  
÷ 2000 hours (average amount of hours agents work per year)  
Your Value Per Hour

Now it's time to change your mindset...  
learn what you are worth per hour and focus on the activities that bring results.

## EXERCISE:

- List out all your activities and calculate the number of hours it takes to complete this each week.
- Using your value per hour, consider if you should continue doing this yourself or delegating this task to another person.





DATE
------

S	M	T	W	TH	F	S
DAY OF WEEK						

<b>DAILY ACTIVITY RECORD</b>
NAME:

<b>Follow Up Calls:</b>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
<b>Note Cards Sent:</b>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
<b>Homes Previewed:</b>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
<b>Email Follow Up:</b>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
<b>Entered into Drip System:</b>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
<b>Drop Bys:</b>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
<b>Social Media Posts:</b>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
<b>Lunches:</b>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
<b>Phone Duty Calls:</b>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
<b>Number of Face to Face Appointments:</b>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
<b>Number of People Attending Open Houses Held Today:</b>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23

DATE:	
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YTD GOAL:	
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<b>DETAILS</b>
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<b>CONTACTS:</b>	<b>NEGOTIATION OFFERS:</b>
	<b>HANDWRITTEN OFFERS:</b>
<b>PAST CLIENT CALLS:</b>	<b>LEADS:</b>
	<b>DEALS FELL THROUGH:</b>
<b>SELLER CALLS:</b>	<b>EXPIREDS/WITHDRAWNS:</b>

# CREATE YOUR OWN TOUCH SYSTEM



## Newsletters

- Personalized, value added
- Hard copy at beginning of month
- Electronic copy mid-month
  - K.I.T.S
  - Morris Marketing
  - DMS Marketing



## Market Report

- Complimentary CMA
- By email or mail
- Once or twice per year
- Unsolicited
- Solicited



## Milestone Gifts

- A Card or Small Gift
- Anniversary of home purchase, birthday, special occasions
- [SendoutCards.com](http://SendoutCards.com)



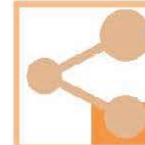
## Service Directory

- My Client's Recommend...
- Homeowner Trade & Services
- Yearly by email or mail



## Pop By

- Deliver holiday-related gift, annually.
- Special gifts for A & B list clients
  - Spring, summer, fall
  - Ex. Ketchup, Relish Mustard packs for BBQ



## Social Media

- Comment and respond to your supporters social media postings or updates
  - Congratulate
  - Ask How's business? How's life?



# EMAILS

# SEND MONTHLY

To: Client

CC:

Subject: Real Estate Update – March xxxx

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Dear Client,

In Kelowna, there were 101 sales in the month of March. This represents a seller's market with a 55% sales to new listings ratio. For March xxxx. Sales for March xxxx were up by 40 units compared to March xxxx.

The Kelowna listing inventory increased by 15 homes compared to February xxxx and increased by 4 homes compared to March xxxx. The average price year to date (YTD) is up 9% compared to March xxxx and is up by \$71,149 compare to February xxxx. The Kelowna median price decreased by \$22,000 from February xxxx to March xxxx (\$2,320,000 to \$2,298,000).

## Kelowna – March xxxx

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Sales	101	61
Sales YTD	266	168
Avg. Price YTD	\$2,713,381	\$2,479,385
Active Listings	488	484
Median Price	\$2,298,000	\$1,868,000

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Thanks!

Realtor

**Realtor Smith | Brokerage**

Here to Help YOU!

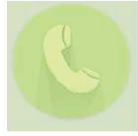
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## Special Events

- Ideas:
  - Movie Morning
  - Baseball Game
  - Home Show Tickets
  - Family Skate
  - Home Buyer / Seller Workshop



## Calls

- Contact 4 times a year
- Open all calls with something of value
  - Recent sales
  - Interest rate
  - Price rising or falling
  - Invitation to client event
  - Congratulations call



## Quick Messages

- Leave spontaneous messages
- By text, voice, note email
- Personal and meaningful to them
  - Just noticed the new landscaping you have done - beautiful!

## Post Sale Service – Implement effective system

### 1 Day, 1 Week, 1 Month

### Post Sale Service

#### *1 Day and 1 Week after Closing*

- Hello \_\_\_\_, this is {realtor}, with \_\_\_\_\_. I wanted to give you a quick call to say thank you for the opportunity and to check in, just in case any challenges or concerns came up regarding your new home.

#### *30 Day Call – Buyer*

- It's been just over 30 days since your move and I wanted to let you know that I am still in touch with the seller. Have any questions popped up since our last call that I can assist you with?

#### *30 Day Call – Seller*

- It's been just over 30 days since your move and I wanted to ask if any questions popped up since our last call that I can assist you with?

## Goal = 27 – 33 touches

Idea / Strategy	# of Touches	Annually
	Recommend Options	YOUR PLAN
Monthly Preferred Client Update Newsletter	12	
Send Comparable Market Analysis	2	
Card or small gift for new home, anniversary, birthday, special occasion	1	
Homeowner Trades & Services Directory	1	
Holiday related, thoughtful gift	2	
Comment on your supporters' social media	2	
Permission based CUEs (eNewsletters)	12	
Personal invitations to special events	2	
Contact your database in person or by phone	4	
Leave spontaneous messages	1	
Post-sale follow up for buyers/sellers	3	
<b>Totals</b>	<b>42</b>	

# SAMPLE MARKETING PLAN

MONTH	RECIPIENTS	THEME PIECE	FORMAT	PROCESS DATE	BY WHEN	COST	# OF PIECES	DESIRED RESULTS	ACTUAL OUTCOME
Jan	Database	Happy New Year	E	Dec 17	Dec 31	0	800	Connecting	72 Opens
	SOI/PC	Thank You Letter	M	Dec 17	15th	\$175	233	10 referrals	6 referrals
	PC	HUD Letter	M	7th	3rd Friday	\$250	233	5 referrals	8 referrals
	Farm 1&2	Market Update	PC/M	Dec 17	1st Friday	\$650	1200	1L	0
	OH	Invites/Misc.	M/D2D	As Needed	2x Month	\$75	50	1L or 1B	1L
	Lead Gen	ML/Craigslist	I	As Needed	5x wk., 3x day	0	0	3B	1B
	FTHB	Home Buying Process	Class	As Needed	Saturdays	\$300	25	3B	0
	Floor	Up calls			7-9x Month	0	0	1L or 1B	1B
Feb	SOI/PC	Happy Valentine	E	4th	12th	0	800	Connecting	38 opens
	SOI/PC	Just Sold	M	4th	2nd Friday	\$650	1200	1B	0
	SOI/PC	General	NL	4th	3rd Friday	\$175	233	1L or 1B	1L
	OH	Invites/Misc.	M/D2D	As Needed	2x Month	\$125	100	1L or 1B	2L
	Lead Gen	ML/Craigslist	I	As Needed	5x wk., 3x day	0	0	3B	0
	Farm 1&2	Free Market Analysis	PC/M	Jan 21	1st Friday	\$650	1200	1L or 1B	1L
	Floor	Up calls			7-9x Month	0	0	1L or 1B	1B
	FTHB	Home Buying Process	Class	As Needed	Saturdays	\$300	25	3B	2B
Mar	SOI/PC	Happy St. Patrick's Day	E	4th	14th	0	850		
	SOI/PC	Easter	E	18th	28th	0	233		
	SOI/PC	Daylight Savings Time	E	4th	7th	0	850		
	Farm (1)	Neighbourhood Activity	PC/M	Feb 18	1st Friday	\$350	500		
	FTHB	Home Buying Process	Class	As Needed	Saturdays	\$75	25		
	OH	Invites/Misc.	M/D2D	As Needed	2x Month	\$125	100		
	Lead Gen	ML/Craigslist	I	As Needed	5x wk., 3x day	0	0		
	Floor	Up calls			7-9x Month	0	0		

# NEXT TWO MONTHS

## MARKETING PLAN

MONTH	RECIPIENTS	THEME PIECE	FORMAT	PROCESS DATE	BY WHEN	COST	# OF PIECES	DESIRED RESULTS	ACTUAL OUTCOME

MONTH	RECIPIENTS	THEME PIECE	FORMAT	PROCESS DATE	BY WHEN	COST	# OF PIECES	DESIRED RESULTS	ACTUAL OUTCOME

# BUSINESS EXPENSES

2024 EXPENSES	2023 EXPENSES		2024 EXPENSES	NOTES
	MONTHLY	ANNUALLY		
Dues (RE Board Dues/MLS Dues)				
Business Entertainment (Meals, Coffee, Cocktails, Events)				
Coaching				
Communication (Mobile Phone, Home Bus. Line, Internet)				
Education (Seminars, Books, CD's, etc.)				
Equipment & Supplies (Computers, Office Supplies, etc.)				
Accounting/CPA (Taxes)				
<b>Marketing</b>				
Print Advertising				
Online Advertising/Website				
Direct Mail				
Signs, Flyers, Brochures, Presentation Materials				
Promotional (Gifts, Event Tickets, Sponsorships, etc.)				
Marketing Consulting				
Other Marketing				
Other Marketing				
Misc. Sales Cost (Agent Paid Inspections, Repairs, Goodwill, Staging, etc.)				
Outside Services (Consulting, Book Keeping, etc.)				
Transaction Coordination				
Travel Expense (Airfare, Lodging, Ground Transportation, Incidentals)				
IRA Contribution				
Wages (Assistant, Employees)				
Other				
Other				
Other				
Other				
<b>TOTAL BUSINESS EXPENSES</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	



# PERSONAL EXPENSES

ITEM	2023 EXPENSES	2024 EXPENSES	NOTES
Auto Gas			
Auto Insurance			
Auto Maintenance			
Auto Payments (Lease/Loan)			
Auto Purchase			
Auto Registration			
CATV/Satellite TV			
Cell Phone			
Charitable Contribution			
Childcare			
Clothing			
Club Membership			
Entertainment			
Food & Groceries			
General Household Items			
Gym, Health & Beauty			
Home & Yard Maintenance			
Homeowners Insurance			
Household Utilities			
Life Insurance			
Medical/Dental Expense			
Mortgages/Rent			
Personal Savings			
Property Taxes			
School Tuition K-12			
Vacation			
Retirement Savings			
College Funds			
Other			
Other			
Other			
Other			
Other			
<b>TOTAL PERSONAL EXPENSES</b>	<b>\$0</b>	<b>\$0</b>	

# MONTHLY VISIT

# YOUR MONEY CHECKLIST

1. Review pending pipeline
2. Review listings and potential income from their sale
3. Money / cash on hand / reserves
4. Review credit card purchases and big expenditures from the previous month
5. Review status of investments / rentals
6. What big expenses or purchases are coming in the next month?
7. What taxes are due in the next month?
8. Review new projects and promotions and their cost vs. results
9. Review marketing expenses and results
10. What money management activities do I need to do in the next month?  
(Example: meet with accountant, raise rents, switch insurance brokers)

**In addition, track your net worth every month!**

# BUCKETS OF WEALTH

The income I will earn in the new year:

Net to me before taxes and expenses:

1. My personal annual expenses:

2. My annual business expenses:

3. Estimated annual taxes:

4. Leftover profit:

5. What I will do with the profit:

1. Liquid reserves
2. Real estate investments
3. Start, own, buy, invest in businesses
4. Leverage financial instruments
5. Create a legacy / help family / pay off debt / be generous

## PROFIT



# KNOWING MY NUMBERS

It is so important to track and measure our income goals. We need to visually see the effort required to obtain our goal. Please complete the following exercise and return the document to me.

Your Gross Commission Income Goal for 2024?

\$ \_\_\_\_\_

Average Commission \$\$ per end?

\$ \_\_\_\_\_

- Agents can prospect 8 contacts per hour
  - 50 Leads - Prospects Contacted = 1 Listing Appointment
  - Every 10 Listing Appointments 7 will list
  - Every 10 Listings 7 will sell
- How many listings do you need in 2024?
  - How many listing appointments do you need in 2024?
  - How many contacts do you need in 2024?
  - How many days will you work in 2024?
  - How many contact so you need to make a day?
  - How many listing appointments do you need to make a week?
  - How many hours a day lead generation for listings?

**Example** of a coaching client with an income goal \$235,000 for the year at \$4,555 an end average working 45 weeks this year.

To achieve my goal \$235,000 GCI

I need 62 listings in 2024

I need to go on 83 listing appointments

50 leads = 1 appointment; therefore I need to generate 4150 leads

I plan to work 45 weeks; therefore need to generate 92 leads a week

$92 / 5 = 18.4$  leads per day.

**At a rate of 8 leads / hour I need to actively prospect 2.25 hours/day**

# SUMMARY

1. Total Business Expenses: \$
2. Total Personal Expenses: \$
3. Estimated Taxes: \$
4. Estimated desired savings: \$
5. Total Expenses: \$
6. Average Gross Commission Per End: \$
7. Transactions Required Annually:
8. Transactions Required Monthly:
9. Average Sales to Listings Ratio:
10. Number of appts. to get one listing:
11. Number of appts to achieve listing goal:
12. Number of appointments per week:



# REALITY STEP 2

# DEBT

	MONTHLY	TOTAL
Credit Cards	1. 2.	
Auto Loans	1. 2.	
Student Loans	1.	
Lines of Credit	1. 2.	
Real Estate	1. 2. 3.	
Other Loans & Debt	1. 2. 3. 4. 5.	
IRS	1. 2.	
	<b>TOTAL MONTHLY</b> = \$ <input type="text"/>	<b>TOTAL</b> = \$ <input type="text"/>



# REALITY STEP 4

# NET WORTH

## ASSETS

Cash	<input type="text"/>
Savings	<input type="text"/>
Checking	<input type="text"/>
Bonds / CDs	<input type="text"/>
Life Insurance Cash Value	<input type="text"/>
Annuities (surrender value)	<input type="text"/>

**TOTAL =**

\$

## INVESTMENTS

Brokerage Accounts	<input type="text"/>
Mutual Fund Accounts	<input type="text"/>
Personally Held Stocks / Bonds	<input type="text"/>
Other	<input type="text"/>
Real Estate (non-owner occ.)	<input type="text"/>

**TOTAL =**

\$

# NET WORTH CONT'D

## RETIREMENT ACCOUNT

SEP IRA	<input type="text"/>
Traditional / Rollover IRA	<input type="text"/>
401(k) / 403(b), etc.	<input type="text"/>
Profit Sharing	<input type="text"/>
Pensions	<input type="text"/>

**TOTAL =** \$

## OTHER ASSETS

Primary Home	<input type="text"/>
Autos	<input type="text"/>
Jewelry / Metals / Gems	<input type="text"/>
Collectibles	<input type="text"/>
Furnishings / Art	<input type="text"/>
Other	<input type="text"/>

**TOTAL =** \$

**TOTAL ASSETS =** \$   
(Assets + Investments + Retirement Account + Other Assets)

# NET WORTH CONT'D

## LIABILITIES

Mortgage	<input type="text"/>
Auto Loans	<input type="text"/>
Credit Card Balance	<input type="text"/>
Student Loans	<input type="text"/>
Back Taxes Owed	<input type="text"/>
Home Equity	<input type="text"/>
Lines of Credit	<input type="text"/>
Investment Debt	<input type="text"/>
Mutual Fund Accounts	<input type="text"/>
Business Debt	<input type="text"/>

**TOTAL =**

\$

**NET WORTH** = \$  
(Assets - Liabilities)

# NET WORTH **TAKE ACTION!**

In order to **increase** our **net worth**, we must **spend** less than we **earn**.

With any excess left over, we must pay off liabilities and reinvest the rest.

We can stop when those investments create the annual income needed for our desired lifestyle.

**GOAL:** Work when I want, on what I want, for who I want, or not work at all.

## **ACTION ITEMS:**

1. Expenses

2. Income

3. Liabilities

4. Investments

# GIVING MODEL

## 1. Give your gratitude

Examples:

## 2. Give your time

Examples:

## 3. Give your money

Examples:

## 4. Give your leadership

Examples:

## 5. Teach others to give

Examples:

# Business Planning

## One Page Action Plan

2023 GOAL SUMMARY				
Business Summary 2023	Per Year	Per Month	Per Week	Personal Goals
1. Total Days Worked				
2. Total Hours Prospecting				
3. Total Contacts				
4. Total Listing Appointments:				
5. Total Listings Taken:				
6. Total Listings Expired:				<b>Business Goals</b>
7. Total Listings Cancelled				
8. Total Listings Sold				
9. Total Buyer Sales:				
10. Total Price Reduction				
11. Total Closed Transactions				
12. Total Paid Income				
13. Total Business Expense				
14. Total Pre-Tax Profit				
15. Pendings At Year End				
16. Inventory At Year End				
17. Average Sales Price:				
18. Average Commission Check:				
				<b>Team Goals</b>



# Action Steps

Name	
<b>My Annual Actions</b>	

<b>My Monthly Actions</b>	

<b>My Weekly Actions</b>			
Week 1	Week 2	Week 3	Week 4



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