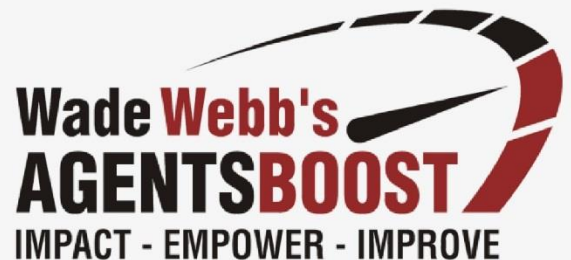


2018

BUSINESS PLAN

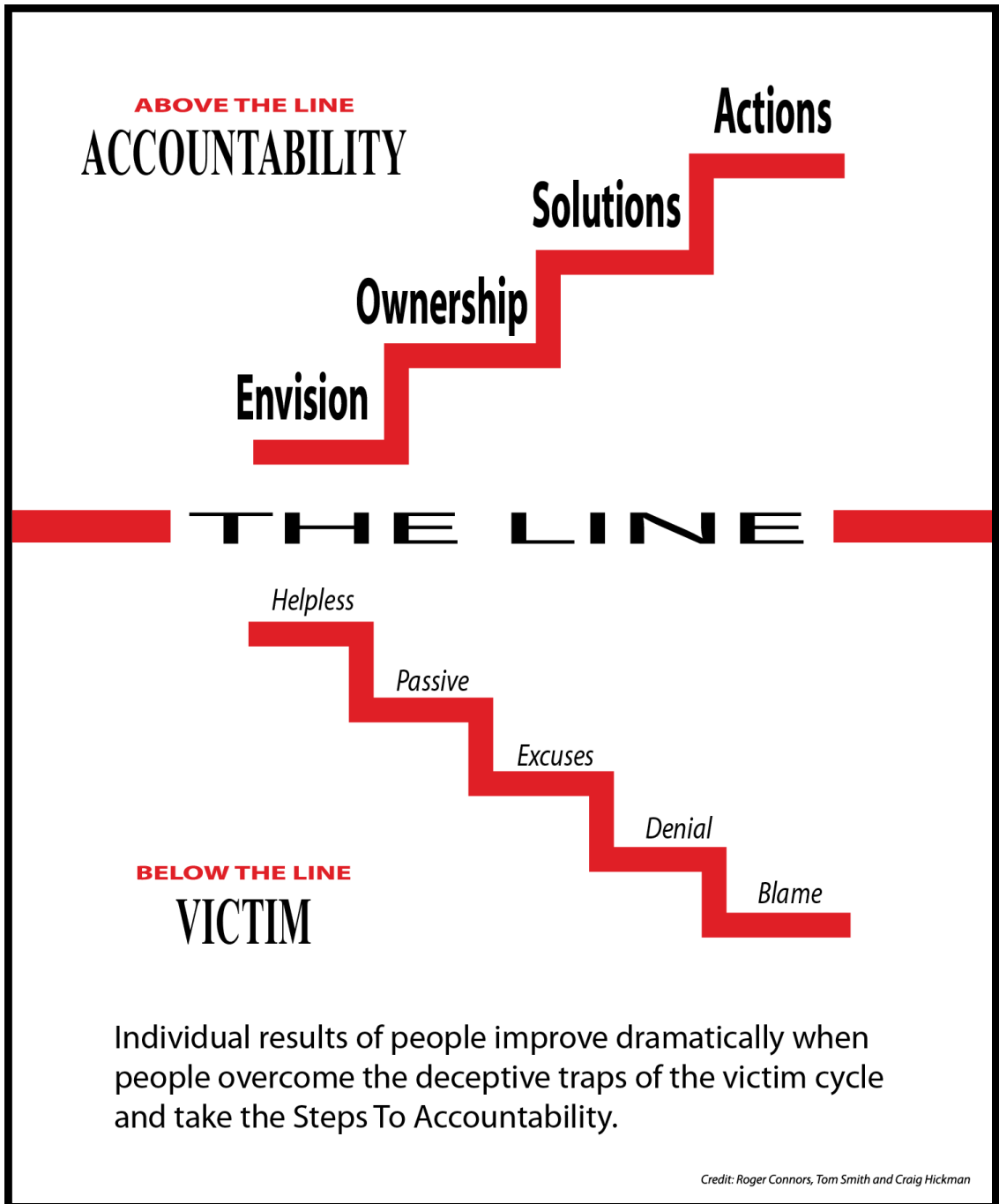


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PERSONALIZED BUSINESS PLAN

❖ **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

**“I learned to embrace risk as long as it was well thought out and,
in a worst-case scenario, I’d still land on my feet.” – Eli Broad**



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REFLECTION

(PREVIOUS YEAR)

❖ **AVERAGE SALE PRICE?**

(MARKET & YOUR OWN)

❖ **AVERAGE COMMISSION?**

(MARKET & YOUR OWN)

❖ **TOTAL NUMBER OF CLOSED TRANSACTIONS?**

❖ **GROSS COMMISSION INCOME?**

❖ **SALES VOLUME?**

(TOTAL DOLLAR VALUE OF HOMES SOLD)

❖ **BUYERS vs. SELLERS RATIO?**

(NUMBER OF CLOSED BUYERS vs. SELLERS)

❖ **SOURCE OF BUSINESS?**

(WHERE DID THEY COME FROM)

“I think the most important CEO task is defining the course that the business will take over the next five or so years. You have to have the ability to see what the business environment might be like a long way out, not just over the coming months. You need to be able to both set a direction, and also to take particular decisions along the way that make that broad direction unfold correctly.” – Chris Corrigan



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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

“Even when you think you have your life all mapped out, things happen that shape your destiny in ways you might never have imagined.” – Deepak Chopra



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MARKET ANALYSIS

❖ WHAT TYPE OF MARKET ARE YOU IN?

(BALANCED, BUYERS, SELLERS)

❖ WHERE HAS THE MARKET BEEN?

❖ WHERE IS THE MARKET GOING?

PROJECTION

❖ WHAT DO YOU BELIEVE IS GOING TO HAPPEN?

❖ PRICES?

(STABLE, UP, DOWN)

❖ LISTINGS?

(STABLE, UP, DOWN)

❖ SALES?

(STABLE, UP, DOWN)

❖ NUMBER OF AGENTS?

(STABLE, UP, DOWN)

“When defeat comes, accept it as a signal that your plans are not sound, rebuild those plans, and set sail once more toward your coveted goal.” – Napoleon Hill



Where Has Your Business Come From?

- [illegible]

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:

RELATIONSHIPS & 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
Total Score:	
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
Total Score:	

“If everyone is thinking alike, then somebody isn't thinking.” – George Patton

BUSINESS	
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
Total Score:	

FINANCIAL	
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
Total Score:	

“Planning without action is futile, action without planning is fatal.” – Unknown

SPIRITUAL	
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
Total Score:	

MENTAL	
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
Total Score:	

“A man can succeed at almost anything for which he has unlimited enthusiasm.”
– Charles M. Schwab

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

Total Score:

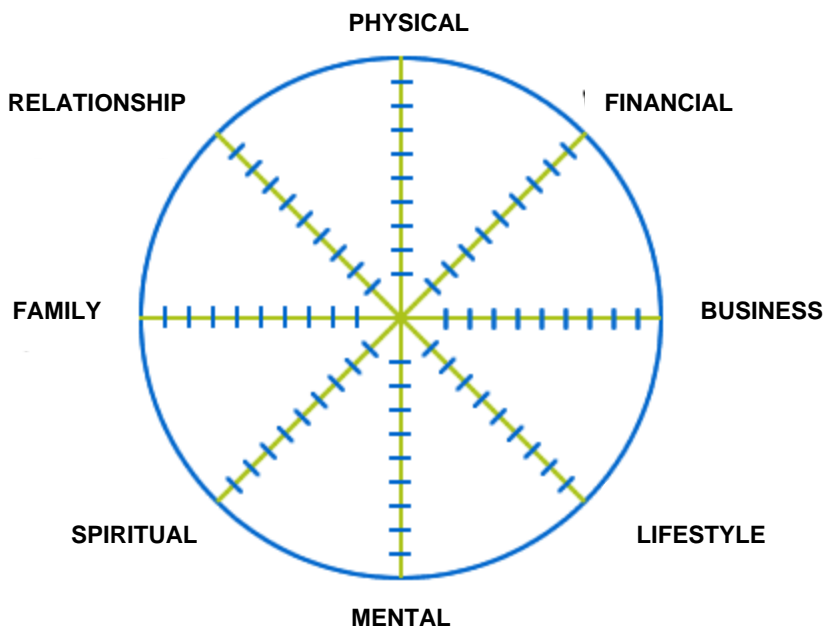
THE WHEEL OF LIFE

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:

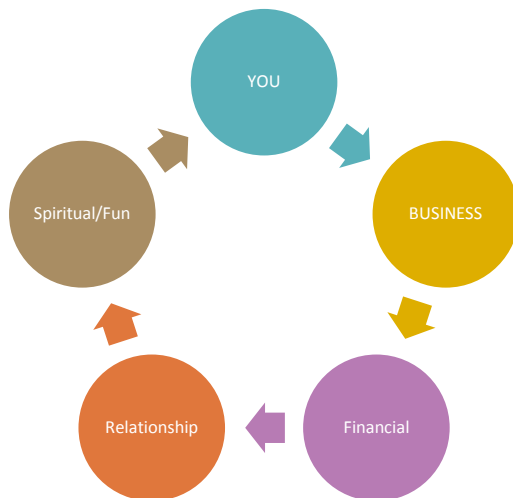
- Score of 5 = 1 notch
- 6 – 10 = 2 notches
- 11 - 15 = 3 notches
- 16 - 20 = 4 notches
- 21 – 25 = 5 notches
- 26 – 30 = 6 notches
- 31 – 35 = 7 notches
- 36 – 40 = 8 notches
- 41 – 45 = 9 notches
- 46 – 50 = 10 notches

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



“If you want truly to understand something, try to change it.” – Kurt Lewin

Setting 90 Day Goals – The Five Circles



You: What are you doing for just you to grow? Personal? Business? What are you reading? Watching, listening too? Who do you hang with? We are a product of what we know, what are you passing to your kids, friends, etc? What was passed to you? How do you recharge your batteries?

Business: Is it growing? Do you have a plan? Budget? Goals? What are you doing to nurture your business? Help it grow? What are your prospecting activities? Is it a job or a business?

Financial: Do you have a personal budget? Is your family on board? Do you have a 3 month security blanket? Are you working towards it? Do you draw a salary from your business? Are you financially supporting your business?

Relationships: Are your personal relationships secure? Is your family supportive of you and your business through good times and bad? Are you of them? Do you make and schedule time for the people you love? Your time is the most precious gift you can give anyone. Are you growing your relationships? Nurturing, strengthening? Or just surviving?

Spiritual/Fun: Why do you what you do? What do you live for, strive for? What do you think your purpose is? What gets you excited every day? Does your life reflect what you want it too? What you think it should? How do strengthen your spirit? Do your family and friends support you? You them? Who do you hang with? Do they help you when you get off track? Or do they steer you off?



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S.W.O.T. ANALYSIS

BE BRUTALLY HONEST ABOUT YOU!

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

“The best vision is insight.” – Malcolm S. Forbes

EXERCISE: CORE VALUES

Narrow the Core Values below to the top 5 that are most important to you.

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

Creating Your Corporate Mission Statement

Our Purpose

To help real estate sales professionals build inspiring, meaningful and profitable businesses that fully support the lives of their dreams.

Our Values (Who We Are)

We are fun-loving.
We are curious.
We are productive.
We are purposeful.
We are truthful.

Our Practices (What We Do)

We deliver the unexpected.
We authentically attract success.
We do what we say we are going to do.
We work together as a single world-class team.
We don't hire people, we invest in people who believe in what we

Our Principles (What We Know)

We will not always do things right, however we will always do the right thing.
There is nothing that cannot be accomplished, when the right team gets involved in a worthy cause, unattached from who gets the credit.
Success is the continuous process of overcoming challenges.
There is nothing to fear when we are open to everything and attached to nothing.
Making the simple, complex is easy but making the complex simple is pure creativity.

Our Promise

We promise to be true to our purpose and take consistent action in line with who we are, what we do and what we know.



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WHAT IS YOUR VALUE PER HOUR?

Formula:

$$\frac{\text{Gross Commission Earned} - \text{Expenses}}{\text{Net Annual Income}}$$

$$\frac{\text{Net Annual Income}}{\div 2000 \text{ hours (average amount of hours REALTORS® work per year)}} = \text{Your Value Per Hour}$$

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.

Create Your Database Touch System

Recommended 27-33 Touches each year.



Newsletters

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



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



Service Directory

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



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?



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EMAILS – send monthly

To: Client

CC:

Subject: Real Estate Update – March xxxx

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

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

Thanks!

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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?



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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	
Totals	42	

The Perfect Week

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
5am							
6am							
7am							
8am							
9am							
10am							
11am							
12am							
1pm							
2pm							
3pm							
4pm							
5pm							
6pm							
7pm							
8pm							
9pm							
10pm							

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
	SOL/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	SOL/PC	Happy Valentine	E	4th	12th	0	800	Connecting	38 opens
	SOL/PC	Just Sold	M	4th	2nd Friday	\$650	1200	1B	0
	SOL/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	SOL/PC	Happy St. Patrick's Day	E	4th	14th	0	850		
	SOL/PC	Easter	E	18th	28th	0	233		
	SOL/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		

*E=Email *PC=Postcard *C=Call *P/N=Personal Note *F=Facebook *NL=Newsletter

*D2D=Door to Door *W=Walk *M=Mail *I=Internet



NEXT FOUR MONTHS

Marketing Plan

Your Plan—Blueprint

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

Design Your Ideal Business



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STRATEGIES AND TACTICS

1. Branding Objectives:

2. System/Process Development Objectives:

3. Professional Development Objectives:

(Formal and informal, i.e. classes to take, specific books to read, conventions to attend)

“You must master your time rather than becoming a slave to the constant flow of events and demands on your time. And you must organize your life to achieve balance, harmony and inner peace.” – Brian Tracy



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Weekly Business Meeting Outline

DATE: _____

1. Call to Order
 - a. Attendance
 - b. Recap Last Meeting and Results
2. Current Business Updates
 - a. Listing Transactions
 - b. Pending in Escrow/Contracts
 - c. Customer Service
3. Lead Generation
 - a. Leads
 - b. Marketing
4. Project Updates
 - a. DO
 - b. DOING
 - c. DONE
5. Administrative Updates
6. Agent/Team Updates
7. Additional Agenda Items
8. Intended Actions and Results for Next Meeting
9. Schedule of Next Meeting



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Business Expenses

2018 EXPENSES	2017 EXPENSES		2018 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)				
Marketing				
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)				
Investment Contribution				
Wages (Assistant, Employees)				
Other				
Other				
Other				
Other				
TOTAL BUSINESS EXPENSES				

“Becoming wealthy is not a matter of how much you earn, who your parents are or what you do...it is a matter of managing your money properly .” – Noel Whittaker



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Personal Expenses

ITEM	2017 EXPENSES	2018 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			
TOTAL PERSONAL EXPENSES			

“Unless you have definite, precise, clearly set goals, you are not going to realize the maximum potential that lies within you.” – Zig Ziglar



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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 2018?

\$ _____

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 2018?
- ❖ How many listing appointments do you need in 2018?
- ❖ How many contacts do you need in 2018?
- ❖ How many days will you work in 2018?
- ❖ 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 2016

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:

“The starting point of great success and achievement has always been the same. It is for you to dream big dreams. There is nothing more important, and nothing that works faster than for you to cast off your own limitations than for you to begin dreaming and fantasizing about the wonderful things that you can become, have and do.” – Noel Whittaker



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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

“You need a plan to build a house. To build a life, it is even more important to have a plan or goal.” – Zig Ziglar



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Thank you for downloading the AgentsBoost Business Plan Workbook.

If you would like help implementing a comprehensive business plan into your Real Estate business, reach out to Wade on his website and he would be happy to help...

[AgentsBoost.com/coaching-speaking/](https://www.AgentsBoost.com/coaching-speaking/)