

2023 BUSINESS PLAN



*Making it your best
year in real estate!*

WHAT YOU WANT

INCOME GOAL:

How much money will I produce by following through with this business plan?

Revenue	Expenses	Profit	Wealth	
Gross Commission Income (GCI)	Expense Tracker	Net Commission Income (NCI)	Wealth Tracker	
\$ _____	\$ _____	\$ _____	Savings Contribution \$ _____	Debt Reduction \$ _____

TRANSACTIONS GOAL:

How much money will I produce by following through with this business plan?

SELLERS			BUYERS			LEASES		
Percentage of Revenue	Average Sales Price	Average Commission	Percentage of Revenue	Average Sales Price	Average Commission	Percentage of Revenue	Average Sales Price	Average Commission
%	\$	\$	%	\$	\$	%	\$	\$
Total Seller Transactions: <small>(Income Goal ÷ Avg. Commission) x Pct. Revenue</small>	#		Total Buyer Transactions: <small>(Income Goal ÷ Avg. Commission) x Pct. Revenue</small>	#		Total Lease Transactions: <small>(Income Goal ÷ Avg. Commission) x Pct. Revenue</small>	#	
Total Listings Taken:	#		Total Buyer Appointments:	#		Total Lease Appointments:	#	
Total Listing Appointments:	#							

CONVERSATIONS GOAL:

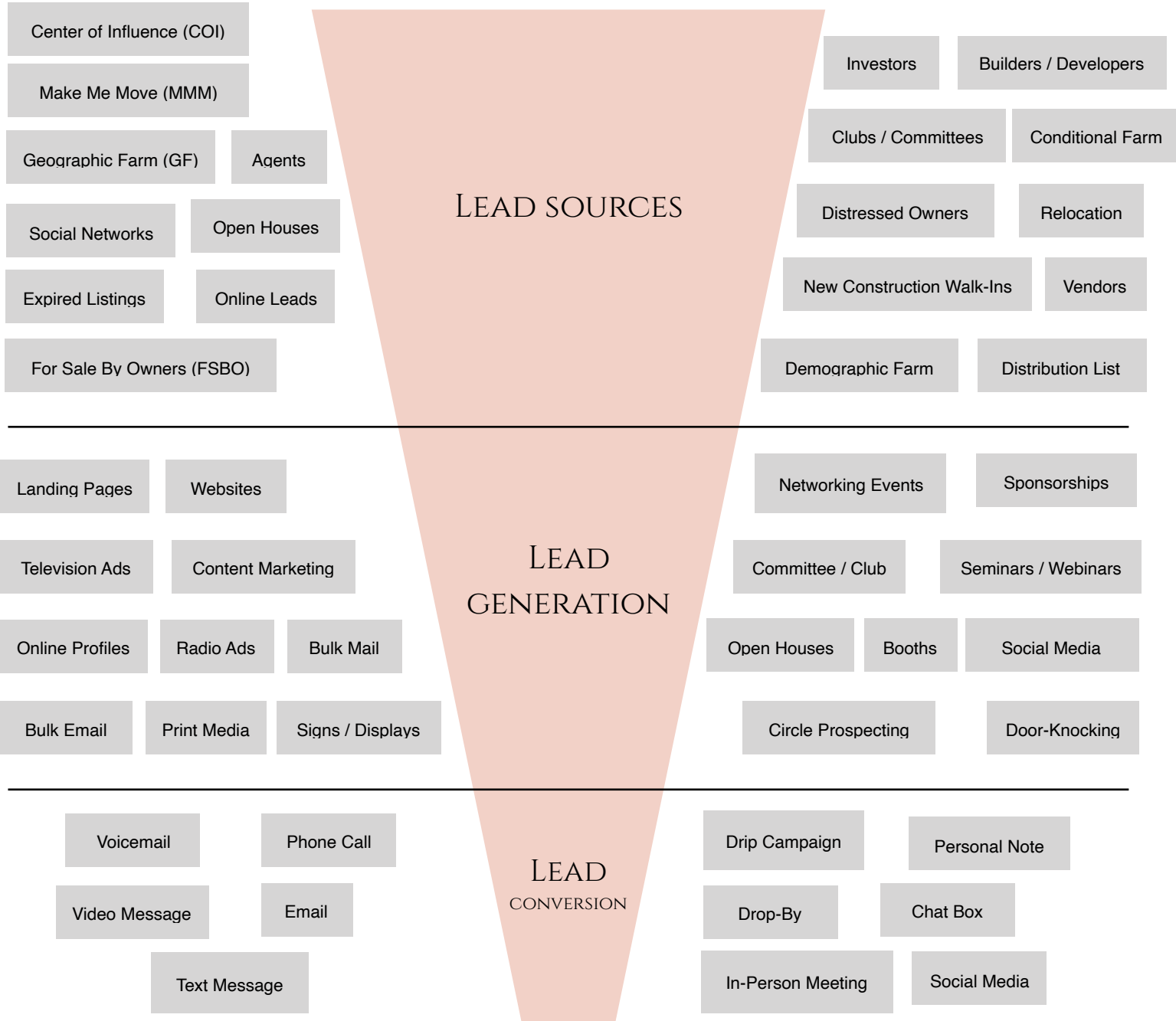
How many conversations about real estate do I need to have to meet my transaction goal? *For every 40 conversations you have about real estate with new leads or your database, you can anticipate 1 closed transaction.*

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 # _____ Daily Quota ÷ 2	With People I Don't Know # _____ Daily Quota ÷ 2	

HOW YOU WILL GET IT

LEADS:

How will you get your leads, that will generate you income?



HOW YOU WILL GET IT

LEAD SOURCE:

The audience you will target for your business.

TARGET AUDIENCE

Geographic Farm - Canterbury Trails Subdivision (432 Residents)

LEAD GENERATION:

The way you will generate leads within your target audience.

Marketing Plan

Networking Plan

Prospecting Plan

Advertising to create awareness	Socialize to create referral opportunities	Contacting groups of people to generate leads
<i>24 Open Houses (2x a month)</i>	<i>Annual Booth at Event</i>	<i>OH Neighbor Invites (semi-monthly)</i>
<i>24 Open House Previews (2x a month)</i>	<i>PTA Board Meetings</i>	<i>Circle Prospecting (2 days a week)</i>
<i>12 Mailers (1 per month)</i>	<i>City Business Meetings</i>	<i>Door Knocking (2 days a week)</i>
<i>Monthly Targeted FB Videos</i>	<i>FB Community Group Involvement</i>	<i>Purchase Bold Leads</i>
<i>Weekly FB Home Valuations Ads</i>		
<i>Weekly FB Home Search Ads</i>		

LEAD CONVERSION:

The way in which you will set appointments.

Follow-Up Plan

Nurturing Plan

Repeated Communication to engage non-responsive leads	Repeated Communication to engage responsive leads
<i>Bold Lead Follow Up Plan</i>	<i>Bold Lead Nurture Plan</i>
<i>Open House Follow Up Plan</i>	<i>FB Seller Nurture Plan</i>
<i>FB Seller Follow Up Plan</i>	<i>FB Buyer Nurture Plan</i>
<i>FB Buyer Follow Up Plan</i>	<i>Neighbor Nurture Plan</i>
<i>Neighbor Follow Up Plan</i>	

WHEN IT WILL HAPPEN

YOUR MONEY MAKING DAY:

What does your daily schedule look like that will meet these goals?

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

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YOUR MONEY MAKING DAY:

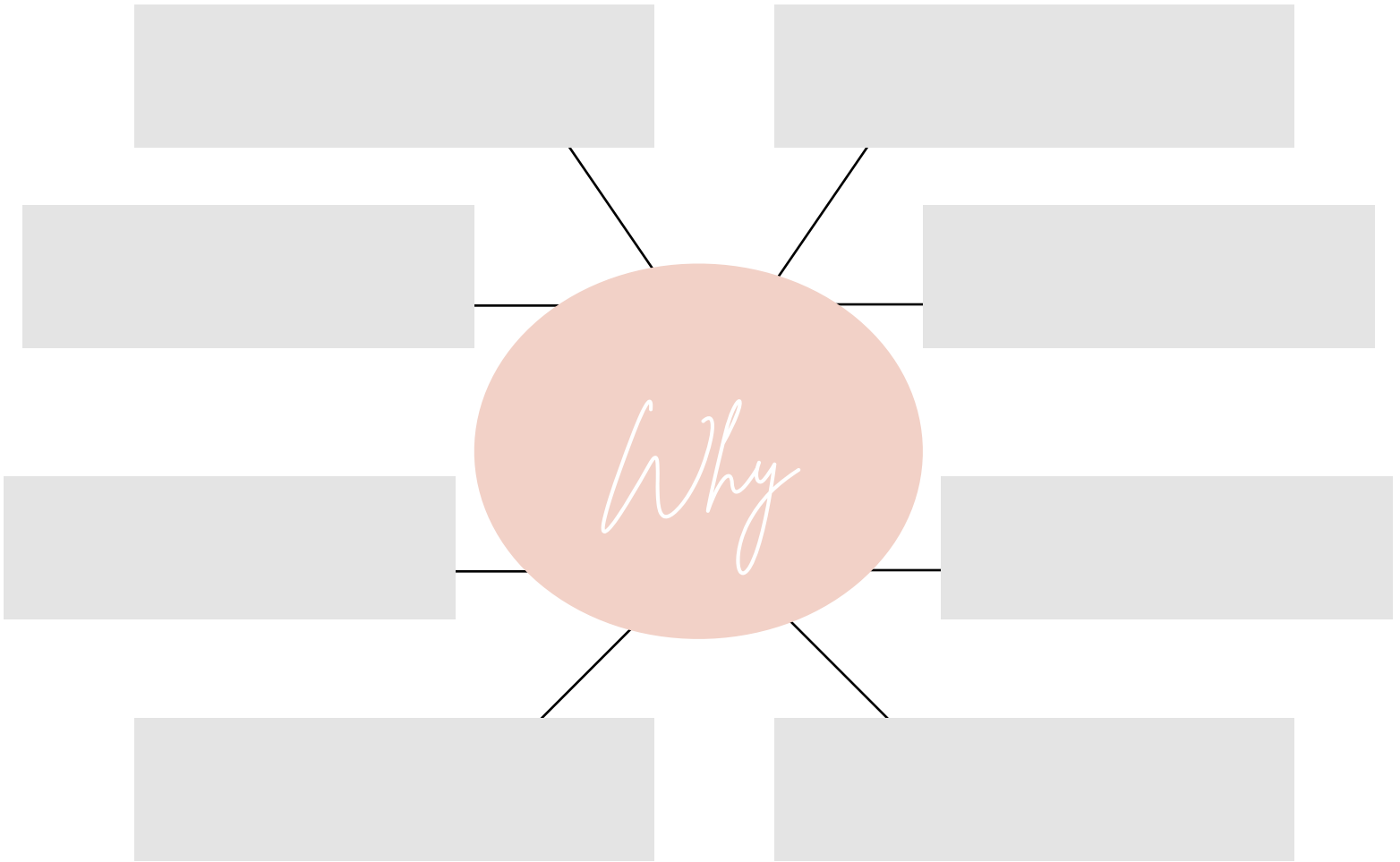
What does your daily schedule look like that will meet these goals?

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							

WHY YOU WANT IT

THE ENTIRE REASON BEHIND CARRYING OUT THIS PLAN:

What is your “why”?



If I Succeed...

• _____
• _____
• _____
• _____
• _____

If I Fail...

• _____
• _____
• _____
• _____
• _____

WHERE YOU CAN IMPROVE

HOW YOU RATE YOURSELF ON YOUR SKILLS TO CARRY OUT THIS PLAN.

Lead Generation

POOR	FAIR	GOOD	EXCELLENT
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Organization Skills

POOR	FAIR	GOOD	EXCELLENT
------	------	------	-----------

Wellness

POOR	FAIR	GOOD	EXCELLENT
------	------	------	-----------

Lead Conversion

POOR	FAIR	GOOD	EXCELLENT
------	------	------	-----------

Communication Skills

POOR	FAIR	GOOD	EXCELLENT
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WHERE YOU CAN IMPROVE

SHARPENING YOUR SKILLS

What trainings or events will you attend throughout the year to improve those skills that you're not excellent in?

JANUARY	FEBRUARY	MARCH
•	•	•
•	•	•
•	•	•
•	•	•
APRIL	MAY	JUNE
•	•	•
•	•	•
•	•	•
•	•	•
JULY	AUGUST	SEPTEMBER
•	•	•
•	•	•
•	•	•
•	•	•
OCTOBER	NOVEMBER	DECEMBER
•	•	•
•	•	•
•	•	•
•	•	•

