THE 2020 PREPAVE

Annual Business Planning & Integration

THIS PLAN BELONGS TO:

____

NAME

____

COMPANY

business efficiency

WELCOME TO THE 2020 PREPAVE!

There are seven segments to this year's Business Planning Process:

- ☐ **Segment 1:** Current Year-in-Review (2019)
- ☐ **Segment 2:** Business Diagnostic A: Systems & Processes

  Business Diagnostic B: Best Business Practices
- ☐ **Segment 3:** Designing My Business in 2020
- ☐ **Segment 4:** Marketing &Visibility Plan
- ☐ **Segment 5:** 2020 Financial Goals & Business Budget
- ☐ **Segment 6:** First Quarter 2020 Action Plan
- ☐ **Segment 7:** Tracking My Business in 2020

SEGMENT ONE:
2019 IN REVIEW

How many transactions will have closed by year-end? ____________________

2019 Gross Commission Income (GCI) Goal ____________________

Total Estimated 2019 GCI ____________________

Total Estimated Take-Home (after splits) ____________________

Total fees paid to Transaction Coordinator ____________________

Total fees paid to Assistant ____________________

Total number of Listings taken ____________________

Total number of Listings sold ____________________

Total number of Buyer Sides closed ____________________

Total number of referrals I sent out ____________________

Number of referrals closed and paid to me ____________________

Where did my business come from in 2019?

__________ Transactions from agent referrals

__________ Transactions from sphere (repeat business and referrals)

__________ Transactions from website-generated leads

__________ Transactions from internet leads (Zillow, Realtor.com, etc.)

__________ Transactions from sign calls

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___________ Transactions from other:________________________________

What went well for me in 2019?

____

____

What did not go well in 2019 and why?

____

____

What were my Lead Generating Activities in 2019?
(Print Marketing, Gifts, Events Held, Entertainment, RE Reviews etc.)

	Worth It?	Do it Again?
______________________________	Yes ☐ No ☐	Yes ☐ No ☐
______________________________	Yes ☐ No ☐	Yes ☐ No ☐
______________________________	Yes ☐ No ☐	Yes ☐ No ☐
______________________________	Yes ☐ No ☐	Yes ☐ No ☐
______________________________	Yes ☐ No ☐	Yes ☐ No ☐
______________________________	Yes ☐ No ☐	Yes ☐ No ☐
______________________________	Yes ☐ No ☐	Yes ☐ No ☐

How many people are in my sphere? ____________________
(People who know me, like me, trust me, have done business with me or would refer business to me?)

Home many homeowners are in my sphere? ____________________

SEGMENT TWO:
THE BUSINESS DIAGNOSTICS

DIAGNOSTIC A: SYSTEMS & PROCESSES

Instructions: Rate yourself on the statements provided using the following numerical scale. Maximum scoring on each individual segment is 15. **Consider focusing on any segments where you score 10 or less.**

3 – I incorporate this practice to a high degree.
2 – I incorporate this practice to a moderate degree.
1 – I incorporate this practice to a low degree.
0 – I do not incorporate this practice at all.

ACTION PLANNING

Refers to your ability to establish a plan of action for effectively managing your business and producing results.

A. _____ I set annual goals for myself in writing and check progress on them monthly.
B. _____ I have a written action plan that outlines the tasks I must complete on a quarterly basis in order to attain each of my annual goals.
C. _____ I use quantitative facts to measure and monitor my performance monthly, quarterly and annually.
D. _____ I have a clear vision and direction for my business that I am passionate about achieving.
E. _____ I stay aware of trends occurring in my marketplace, and allow room in my business plan for flexibility.

_____ **Total Score: ACTION PLANNING**

What systems or processes am I missing (or need to polish) to see marked improvement in this segment?

____

TIME MASTERY

Refers to your ability to manage your time effectively, discern "time wasters", and operate your business consciously and "on purpose."

A. _____ I am very good about performing only dollar producing activities during my greatest dollar productive hours.
B. _____ I am able to avoid non-relevant interruptions during my work day and stay focused on what matters most **at the time that it matters**.
C. _____ I manage my non-urgent communication ("B-Priority" phone calls and E-

Mail) during my least dollar productive time blocks.

D. _____ I use a time management system that works well for ME and allows me to be proactive rather than reactive.

E. _____ I spend at least 50% of my work hours on dollar producing activities and at least 25% of that time on new opportunities.

_____ **Total Score: TIME MASTERY**

What systems or processes am I missing (or need to polish) to see marked improvement in this segment?

____

DAILY DISCIPLINES

Refers to daily action planning, habitual ways of working and your ability to manage yourself in your role as a Business Owner.

A. _____ I know the key things I must do daily, weekly and monthly in order to continuously move my business forward...and I do them consistently.

B. _____ I know how to prioritize. I incorporate structure and discipline into my day as needed, without jeopardizing my need for flexibility.

C. _____ I use effective email, digital and paper filing systems that keeps clutter from my work space.

D. _____ I have identified my key standards of personal and professional excellence, which I consciously strive to live by every day.

E. _____ I pre-plan my day before it begins to identify my top three priorities…and work my plan.

_____ **Total Score: DAILY DISCIPLINES**

What systems or processes am I missing (or need to polish) to see marked improvement in this segment?

____

DATABASE MANAGEMENT

Refers to your ability to manage the connections you have made in order to produce results in both client retention and client acquisition.

A. _____ I use a VERY CLEAR system by which to qualify my prospects.

B. _____ Every single name in my database is categorized as a client, prospect, business partner or referral partner and qualified appropriately

C. _____ I maintain one database where I enter all of my contacts.

D. _____ I update my database at least once a week with new names I've acquired to prevent "business card pile-up" and "loss of follow-up."

E. _____ I maintain client records so I can capture customer preferences, important dates, and record key information from conversations.

_____ **Total Score: DATABASE MANAGEMENT**

What systems or processes am I missing (or need to polish) to see marked improvement in this segment?

____

ADMINISTRATIVE EFFICIENCIES

Refers to your ability to handle administrative tasks efficiently and avoid being overwhelmed or distracted by non-dollar productive activities.

A. _____ I handle the bulk of my administrative tasks during the hours I am least likely to connect with my sphere or potential clients.
B. _____ I outsource administrative responsibilities that I don't do well or which take large amounts of my time.
C. _____ If after 10 minutes I am unable to figure out how to accomplish something, I ask for help.
D. _____ I feel comfortable with the amount of time I spend on administrative tasks.
E. _____ My work space is clean, clutter-free, organized and supports my need for order and efficiency in my business.

_____ **Total Score: ADMINISTRATIVE EFFICIENCIES**

What systems or processes am I missing (or need to polish) to see marked improvement in this segment?

____

CLIENT ACQUISITION

Refers to your ability to identify, qualify and generate new prospects and successfully secure them as clients.

A. _____ I work my conversion ratio: I know how many new clients I need on a monthly basis to meet my annual goals, the number of prospecting appointments necessary to attain that conversion…. and I successfully achieve this quota the majority of the time.
B. _____ I regularly attend social events and stay involved in various activities to create visibility for myself and my business…and I follow up with the people I have met within 3 days.
C. _____ I take the time to qualify potential clients using a needs-analysis approach to make sure I don't expend my energy and time unnecessarily.
D. _____ I schedule least one hour every work day to call new contacts and follow-up on the momentum I created that day (or the day before).
E. _____ I add a pre-determined number of people to my database (and passive marketing campaigns) every month and consistently execute passive marketing campaigns to stay connected.

_____ **Total Score: CLIENT ACQUISITION**

What systems or processes am I missing (or need to polish) to see marked improvement in this segment?

____

CLIENT RETENTION

Refers to your ability to develop and maintain long-term customer relationships and establish strongly rooted referral partnerships.

A. _____ I frequently receive referrals from my past clients …and thank them properly for each referral they send my way.
B. _____ My past clients, strategic partners and referral partners receive passive communication from me that is of value to them n a monthly basis via mail or email.
C. _____ I actively connect on a PERSONAL LEVEL with my past clients, referral partners and strategic partners a minimum of once per quarter - face to face or voice to voice.
D. _____ I am familiar with each of my past clients professions and I (a) consistently network THEM together (b) refer business THEIR direction.
E. _____ I communicate my appreciation to my past clients, strategic partners and referral partners on an annual basis through such activities as social events, client appreciation parties, etc.

_____ **Total Score: CLIENT RETENTION**

What systems or processes am I missing (or need to polish) to see marked improvement in this segment?

____

MARKETING & VISIBILITY

Refers to your ability to set yourself apart from your competition, stay connected into your sphere of influence and showcase yourself and your business effectively.

A. _____ I have discovered how I can differentiate myself in my industry and my marketing tools and efforts reflect that.
B. _____ I use creative, out-of-the-box ideas…as well as time tested proven techniques…to market myself and my business.
C. _____ I use technology to assist me to (1) create visibility for myself and my listings and (2) increase my speed of response to inquiries that I receive.
D. _____ I use a clearly defined a **high-touch sales track** to follow-up with people who have demonstrated an immediate need or interest to buy or sell.
E. _____ I use a pre-determined **passive–touch marketing campaign** to stay connected to repeat clients as well as prospects who are not ready to work with me at this time.

_____ **Total Score: MARKETING & VISIBILITY**

What systems or processes am I missing (or need to polish) to see marked improvement in this segment?

MANAGING CURRENT TRANSACTIONS

Refers to your ability to create connectivity with, and instill confidence in, your clients with whom you are in transaction with.

A. _____ I educate my clients using a professional presentation or informative materials to ensure they are educated about the transaction we are engaged in together.

B. _____ I keep additional materials on hand for unusual circumstances that may arise during a transaction so I can keep my clients properly informed every step of the way.

C. _____ I have a scheduled time of day/day of week that I proactively communicate with clients who are in transaction with me and I execute this communication consistently.

D. _____ I use a transaction checklist to make sure I don't miss any dates, deadlines or details of my transactions (or I have an assistant who manages these details for me) allowing me to focus on relationship-building activities rather than administrative details.

E. _____ I frequently survey my clients after transactions close to confirm their experience was a positive one.

_____ **Total Score: MANAGING CURRENT TRANSACTIONS**

What systems or processes am I missing (or need to polish) to see marked improvement in this segment?

____

BUSINESS PARTNERS & TEAM PLAYERS

Refers to your ability to form lasting professional relationships, confidently orchestrate each transaction and create an exceptional service experience for each client.

A. _____ I have established a polished team and a professional network of business partners to whom I feel confident referring my clients.

B. _____ I leverage the products, tool and services available through my company, as well as through my business partners, to enhance my clients' experience.

C. _____ I personally ensure that my clients receive responses to all inquiries whether I am personally handling the inquiry or not.

D. _____ I experience open and honest communication with my business partners and we handle issues that come up easily and effectively.

E. _____ I know my business partners and I have attained a cohesive working relationship (and that my clients experience a high level of service from our efforts) because my clients tell me so.

_____ **Total Score: BUSINESS PARTNERS & TEAM PLAYERS**

What systems or processes am I missing (or need to polish) to see marked improvement in this segment?

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PROFESSIONAL DEVELOPMENT
Refers to your ability to stay informed of industry-related information, stay up-to-date on your education requirements and continue to grow professionally.

A. _____ I make it a point to understand the legal aspect of my industry and get up to date on changes as quickly as possible.
B. _____ I accumulate continuing education credits throughout the year so I can stay focused on my business (rather than rushing to get my credit hours) before licensing deadlines approach.
C. _____ I stay up to date on market trends and understand how they affect my business.
D. _____ I make sure my education includes personal development, business training and sales training, as well as industry related and required training, to continuously improve myself personally and professionally.
E. _____ I am very pleased with the designations I currently hold and the industry specific training I've acquired.

_____ **Total Score: PROFESSIONAL DEVELOPMENT**

What systems or processes am I missing (or need to polish) to see marked improvement in this segment?

____

PERSONAL DEVELOPMENT
Refers to your ability to successfully unplug from your business & enjoy a balanced life between "personal" and "professional."

A. _____ I am 100% present for work when I am working and 100% present for my family and friends when I am with them.
B. _____ I proactively communicate to my clients my hours of availability, as well as the response time they can expect to receive when attempting to reach me outside of those hours, and I stay very true to those hours the majority of the time.
C. _____ I "give myself to myself first" before I give myself away to my clients and my business everyday by engaging in activities that uplift me, inspire me and center me.
D. _____ I have adequate time for relaxation, family time, and time to pursue my personal interests.
E. _____ I have identified a few things that I love to do to unplug when I feel overwhelmed… and I give myself permission to unplug as necessary.

_____ **Total Score: PERSONAL DEVELOPMENT**

What systems or processes am I missing (or need to polish) to see marked improvement in this segment?

____

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BELIEFS & INTENTIONS
Refers to (1) your ability to identify and let go of self-limiting beliefs and behaviors that no longer serve you and (2) your level of intention to embrace new beliefs and behaviors that will propel your business, and your life, to a new level.

A. _____ I am clear about the important changes I want to make in my financial and personal life and I am consistently taking steps to make them.
B. _____ I take care not to let "incompletions" build up in my business or personal life because I know they rob me of clarity, focus and energy.
C. _____ I find myself focusing more on "what is possible" and "what I want" than on what is lacking and not working in my life and my business.
D. _____ I take inventory of miracles that occur in my every day life to help me see the evidence that what I most desire is literally "on its way" to me.
E. _____ I believe that I am talented, smart, educated and professional enough to attract into my life the income and lifestyle I want and desire.

_____ **Total Score: BELIEFS & INTENTIONS**

What systems or processes am I missing (or need to polish) to see marked improvement in this segment?

____

KEEP GOING!

THIS SEGMENT has TWO DIAGOSTICS to bring complete clarity to your business practices. You've just completed Diagnostic A. Continue on to DIAGNOSTIC B.

DIAGNOSTIC B: BEST BUSINESS PRACTICES

Yes	No	Best Business Practices
		Use of Time
		Do you have a scheduled time each day when you proactively communicate with your clients and service providers who are in transaction with you?
		Do you have a scheduled time each day when you reach out to your friends, past clients, leads and referrals to touch base, follow-up or simply stay in flow using the FORD conversation?
		Do you set aside time to provide a real estate review to your past clients and your friends/family who own a home once per year?
		Powerful Presentation Tools
		Do you have a Buyer Interview Sheet readily available?
		Do you have a Prelisting Interview Form readily available?
		Do you have an updated Prelisting Book that you are proud to demonstrate and that you use consistently?
		Do you have several (1) Buyers Presentation Packets & (2) Seller Presentation Packets (3) Relocation Packets readily available to present at a moments notice?
		Are you 100% pleased with your Buyers Presentation?
		Are you 100% pleased with your Listing Presentation
		Do you understand how to use the MLS/County Records to provide an accurate CMA?
		Do you use an easy-to-compile CMA process and provide a visually appealing, easily interpreted CMA presentation?
		Do you have a visually appealing, easy to read Real Estate Review cover letter/presentation?
		Do you continually review and improve your tools, systems and process?
		Online Presence
		Do you have a functional and useful website for consumers that is visually appealing and easy to navigate?
		Are all of your social media profiles (Facebook, Linked In, Twitter, etc.) consistent with each other, creating a powerful online presence?
		Do you regularly acquire client testimonies and publish them online?
		Use of Technology
		Do you have a powerful and updated personal computer?
		Do you use technology for quick and easy mobile presentations?
		Do you utilize technology to help educate, develop allegiance and establish relationships with potential clients?

		Working with Sellers
		Do you have clear dialogs and visual aids to help shift a seller from a "price shopping" mindset to a "results shopping" mindset?
		Are you prepared to confidently answer the 5 most common objections to listing?
		Do you have pricing and staging videos?
		Do you have a marketing plan and an administrative checklist for your listings?
		Do you have a powerful Listing Presentation that clearly demonstrates to your prospect the odds of selling their home?
		• Shows them how to "Price to Sell"
		• Differentiates you from the competition?
		• Clearly demonstrates how you add value to the seller?
		• Demonstrates at least 5 things that you and your company do differently than your competitors?
		Listening & Communication
		Do you know how ask question to "find the need behind the need"?
		Do you have the most common letters /communication standardized so you don't have to recreate the wheel in each written interaction?
		When addressing questions or educating clients do you feel confident and prepared when presenting facts, dialogs, visual aids, stories and research?
		Do you know your product, your market and your competition better than your clients do?
		Financial Serenity
		Do you have a clear financial goal written down where you can see it everyday?
		Is your financial house in order so you are not affected by changes in market conditions or easily distracted by financial concerns?
		Are your taxes paid?
		Do you track your closed files, pending files and potential deals to understand the flow of opportunity through your business and to examine your profitability?
		Do you track where your business is coming from so you know where to put your money and energy for marketing and visibility from year to year?
		Do you know your income per hour… your previous year income divided by 2080? (2080 = 40 hours per week x 52 weeks per year)
		Do you have a "feel good account" where you save money just to save it?
		Do you have wealth creation on "automatic pilot" receiving "mailbox money" or enjoying any kind of residual income stream?
		Planning
		Do you have an annual business plan reflecting your annual financial goals and project objectives?
		Do you have a quarterly action plan to help you execute your annual objectives?

		Developing Relationships
		Do you have a system for generating a continuous flow of buyers and sellers?
		Do you have an engaging "great opening" that enrolls a potential buyer/seller, instills confidence and like-ability which includes a bonding statement/question and a value statement?
		Do you know how to effectively develop relationships to build rapport and deepen connections, as evidenced by your sphere having a sincere allegiance and a driven desire to work with you / refer you?
		Do you build your business based on customer satisfaction, partner relationships and referrals?
		Mind Set
		Do you own that truth that "you are the cause of what's happening"?
		Do you have a clear set of personal and professional values and standards that you operate by, continually striving to keep your activities in alignment with those values and standards?
		Do you have a 1, 5 & 10 year Life Vision including your life's purpose, your mission statement and a Bucket List?
		Do you engage in a written or verbal affirmation practice everyday to ground yourself in your intentions?
		Do you have specific routines that keep you in balance and rituals that help you perform at your best?
		Are you dedicated to developing yourself as a person, as much as you are dedicated to developing yourself as a real estate professional?
		Developing Support Structure
		Indicate your current and desired support structure:

	Have Now?	**Want in 2020?**
Transaction Coordinator	Yes ☐ No ☐	Yes ☐ No ☐
Marketing Assistance	Yes ☐ No ☐	Yes ☐ No ☐
Personal Assistant	Yes ☐ No ☐	Yes ☐ No ☐
Realtor Partner to Cover Vacations /Time Off	Yes ☐ No ☐	Yes ☐ No ☐
Showing Assistant	Yes ☐ No ☐	Yes ☐ No ☐
Buyers Agent	Yes ☐ No ☐	Yes ☐ No ☐
Business Partner	Yes ☐ No ☐	Yes ☐ No ☐
Preferred Title Partner	Yes ☐ No ☐	Yes ☐ No ☐
Preferred Lender Partner	Yes ☐ No ☐	Yes ☐ No ☐
CPA/Accountant	Yes ☐ No ☐	Yes ☐ No ☐
Financial Planner	Yes ☐ No ☐	Yes ☐ No ☐
Day Care Services	Yes ☐ No ☐	Yes ☐ No ☐
House Cleaning Services	Yes ☐ No ☐	Yes ☐ No ☐
Lawn Care Services	Yes ☐ No ☐	Yes ☐ No ☐

		Developing Referral Partners & Strategic Business Partners
		Do you meet with your Referral Partners & Strategic Partners on an annual basis to review the following details: (1) Number of transaction referred between us (2) Number of transactions closed (2) Goals accomplished together for previous year (6) Goals identified for new year (3) What percentage of increase desired next year
		Do you have specific gifts, talents relationships that you bring to the table for your clients that differentiate you in your industry?
		Do your Referral Partners and Strategic Partners know of those differentiating factors well enough to articulate them potential referrals and do they also benefit from them?
		Have you identified and communicated a variety of ways you can add value to your Referral Partners and Strategic Partners based on their unique needs and specific business models?

KEEP GOING!

This segment is NOT COMPLETE until you have answered the questions outlined in THE DIAGNOSTIC RECAP on the next page.

DIAGNOSTIC RECAP:
PRE-PAVING YOUR FIRST QUARTER WHILE COMPLETING 2019

As you consider the questions below, reflect on the diagnostics you've just completed. What processes, systems or business practices came up repeatedly for you as missing or needing improvement? **Consider making these items top priority in your first quarter action plan.**

If you are looking to get a REAL jumpstart, consider what would happen if one or two of these systems were in place PRIOR to January 1st . Working on these priorities over the holiday months can help you position yourself even more effectively for a strong start to the New Year.

1. What are four small changes I can implement within the next 90 days that will make the greatest impact on my BUSINESS?

____

____

____

____

2. What are two small changes I can implement within the next 90 days that will make the greatest impact on my LIFE ?

____

____

3. What LARGE PROJECT or initiative do I want to complete over the next 12 months?

____

____

4. What two small action steps can I execute over the next 90 days to move my LARGE PROJECT forward?

____

____

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SEGMENT THREE:
DESIGNING MY BUSINESS IN 2020

As you consider the questions below, reflect once again on the answers you've already excavated from your diagnostics. Your answers below will further define the specific actions you will take over the next year to bring yourself, your relationships and your business to a new and higher level.

How can I improve my pre-listing packet?

How can I improve my listing presentation?

How can I improve my out-of-town prospects and buyers packets?

How can my website be improved to make it more useful to clients?

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Five things that would maximize my profits and increase my revenue:

1.____

2. ____

3. ____

4. ____

5. ____

Ten things that will support me to maintain or increase my production level and nurture existing relationships:

1.____

2. ____

3. ____

4. ____

5. ____

6.____

7. ____

8.. ____

9. ____

10 ____

Five things that may improve, enhance or polish to keep my business up-to-date:

1.____

2. ____

3. ____

4. ____

5. ____

Ten activities that would support me in develop new relationships and generate new opportunities to experience a greater flow of referrals into my business:

1.____

2. ____

3. ____

4. ____

5. ____

6.____

7. ____

8.. ____

9. ____

10 ____

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Five things to improve the quality of service I'm offering:

1.____

2. ____

3. ____

4. ____

5. ____

Ideas for 2020 to research and consider implementing:

NOTES:

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SEGMENT FOUR:
MARKETING &VISIBILITY PLAN

PASSIVE IDEAS

Brainstorm on items of value you could send via mail or email so you can "be visible when you are not physically visible" to your sphere.

HEART COMMUNITY. HOBBIES. INTERESTS. FUN. HOME. FAMILY.	**MIND** FACTS. STATISTICS.

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ACTIVE IDEAS

Brainstorm ways you can connect, socialize, entertain,
and interact with your sphere face-to-face to stay in relationship
with and actively connect with your sphere.

INDIVIDUALS	SMALL GROUPS	LARGE GROUPS

Next… make a commitment to your favorite ideas for passive and active touches by populating them into your 2020 Flow Plan on the following page.

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MY 2020 MARKETING PLAN

	ACTIVE VISIBILITY SMALL & LARGE GROUP	PASSIVE HEART DIRECT MAIL/EMAIL	PASSIVE MIND DIRECT MAIL/EMAIL
JANUARY			
FEBRUARY			
MARCH			
APRIL			
MAY			
JUNE			
JULY			
AUGUST			
SEPTEMBER			
OCTOBER			
NOVEMBER			
DECEMBER			

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SEGMENT FIVE:
FINANCIAL GOALS & BUSINESS BUDGET

WHAT DO I WANT IN 2020?

MY ANNUAL LIVING EXPENSES	$
MINE TO KEEP (MY FEEL-GOOD ACCOUNT TO SAVE… NOT SPEND)	$
DEBT REDUCTION	$
LARGE PURCHASES	$
RECREATION / VACATIONS	$
PERSONAL GROWTH (SEE "PROJECTED BUSINESS BUDGET" IN THE FOLLOWING PAGES OF THIS PACKET)	$
FAMILY GROWTH	$
BUSINESS GROWTH (SEE "PROJECTED BUSINESS BUDGET" IN THE FOLLOWING PAGES OF THIS PACKET)	$
BUSINESS OPERATIONAL COSTS (SEE "PROJECTED BUSINESS BUDGET" IN THE FOLLOWING PAGES OF THIS PACKET)	$
RETIREMENT FUNDS	$
INVESTMENTS	$
SUB -TOTAL	$
TAXES (33%)	$
TO GIVE	$
MY DESIRED 2020 RECEIVING GOAL	**$**

HOW I WILL MAKE IT HAPPEN

The table below (inspired by Larry Kendall's Ninja Selling) provides a sample formula that helps you get crystal clear about the numbers required to hit your desired receiving goal. You will walk through this process for your own business on the following page. If you have questions about completing this process, connect with Darice Johnston Brown or your Managing Broker.

GETTING CLEAR ABOUT MY NUMBERS		
MY DESIRED ANNUAL RECEIVING GOAL:	$ 240,000.00	
	LISTINGS	SALES
PERCENT OF TOTAL INCOME (LISTING & SALES SHOULD EQUAL 100%)	75%	25%
ANNUAL INCOME	$180,000	$60,000
AVERAGE SALES PRICE	$425,000	$425,000
AVERAGE COMMISSION (PERCENTAGE) USE COMMON PERCENTAGES SPECIFIC TO SIDES OR 3.0 AS AN AVERAGE	3.2%	2.8%
AVERAGE COMMISSION (DOLLAR AMOUNT)	$13,600	$11,900
AGENT'S SHARE OF COMMISSION (CONSIDER OFFICE SPLIT)	90%	90%
AGENT'S AVERAGE COMMISSION AVERAGE COMMISSION DOLLAR AMOUNT X OFFICE SPLIT	$12,240	$10,710
ANNUAL NUMBER OF SIDES TO CLOSE ANNUAL INCOME / AGENT'S AVERAGE COMMISSION (A)	14.7 SIDES	5.6 SIDES
PERCENTAGE THAT ACTUALLY CLOSE PLACE SIDES EXPECTED TO CLOSE IN PARENTHESES (B)	80% (11.76)	80%(4.48)
ANNUAL SIDES THAT NEED TO BE TAKEN ANNUAL # OF SIDES TO CLOSE + DIFFERENCE BETWEEN A &B ABOVE	17.64 SIDES	6.72 SIDES
MONTHLY SIDES TO BE TAKEN ANNUAL# OF SIDES THAT NEED TO BE TAKEN / 12 MONTHS	1.47 SIDES	.56 SIDES
CLOSED VOLUME ANNUAL # OF SIDES TO CLOSE X AVERAGE SALES PRICE	$6,247,500	$2,380,000
COMBINED VOLUME CLOSED LISTING VOLUME + CLOSED SALES VOLUME		$8,627,500

Getting Clear About My Numbers		
My Desired Annual Receiving Goal:		
	Listings	Sales
Percent of Total Income (Listing & Sales should equal 100%)		
Annual Income		
Average Sales Price		
Average Commission (Percentage) Use common percentages specific to sides or 3.0 as an average		
Average Commission (Dollar Amount)		
Agent's Share of Commission (Consider Office Split)		
Agent's Average Commission Average Commission Dollar Amount x Office Split		
Annual Number of Sides to Close Annual Income / Agent's Average Commission (A)		
Percentage That Actually Close Place Sides expected to close in Parentheses (B)		
Annual Sides That Need to be Taken Annual # of Sides to Close + Difference between A &B above		
Monthly Sides to be Taken Annual# of sides that need to be taken / 12 months		
Closed Volume Annual # of Sides to close x Average Sales Price		
Combined Volume Closed listing volume + closed sales volume		

MY 2020 PROJECTED BUSINESS BUDGET

PERSONAL PROMOTION PERSONAL MARKETING, FARMING, BRANDING, HEADSHOT, MONTHLY MAILINGS, ETC.	MONTHLY	QUARTERLY	ANNUALLY
TOTAL			
GIFTS & THANK YOU'S CLOSING GIFTS, CARDS, CLIENT APPRECIATION, REFERRAL GIFTS	**MONTHLY**	**QUARTERLY**	**ANNUALLY**
TOTAL			

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SPECIAL EVENTS ENTERTAINMENT COSTS, PARTIES, INVITATIONS, ETC.	**MONTHLY**	**QUARTERLY**	**ANNUALLY**
TOTAL			

LISTING EXPENSES	**MONTHLY**	**QUARTERLY**	**ANNUALLY**
TOTAL			

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Buyer Expenses	Monthly	Quarterly	Annually
Total			
Presentation Improvements Printing, Binders, Folders, Technology, Etc.	**Monthly**	**Quarterly**	**Annually**
Total			

Operating Expenses Software Subscriptions, Supplies, Etc.	**Monthly**	**Quarterly**	**Annually**
Total			

Personal & Professional Development Expenses education, Coaching, Professional Dues, Publications, Conferences, Designations, Etc.	**Monthly**	**Quarterly**	**Annually**
Total			

ALL OTHER EXPENSES	MONTHLY	QUARTERLY	ANNUALLY
TOTAL			

NOTES:

SEGMENT SIX:
MY QUARTERLY ACTION PLANNING PROCESS

For the most effective business planning experience, your process doesn't stop at establishing your annual plan. Be committed to taking one more critical step in the planning process and COMPLETE YOUR FIRST QUARTER ACTION PLAN.

A Quarterly Action Plan is a simple but powerful tool. It distills your annual business plan down into clear, digestible action steps that can be executed quickly and efficiently over a 90-day period of time.

- After launching a detailed annual planning experience, the Quarterly Action Plan takes only minutes to complete… yet it may be the most important step you can take to achieve clarity, focus and to induce results at the very start of your New Year.

- A new quarterly plan would be prepared PRIOR TO THE START of each new quarter as an optimum way of staying on track with your annual goals and intentions.

***** WHERE DO I FIND IT?**
You can download and customize your Quarterly Action Plan by visiting www.efficiencyessentials.com and selecting the FORMS link.

SEGMENT SEVEN:
TRACKING MY BUSINESS IN 2020

Launch into your New Year with a clear and concise SNAPSHOT of your business!

- Your business tracking tool should be a picture of your business. It must reflect prospective opportunities, current transactions and closed business to be complete. The White Board, one of Darice's B.E. tools, provides such a platform in an easy-to-use, pre-formulated excel spreadsheet.

- Once you establish your White Board, continue tracking your business on a daily or weekly basis to maintain the accuracy of this tool and always know where your next opportunity is coming from.

Now that you can easily track your RESULTS… consider tracking your ACTIVITY!

- By tracking your most critical and never-changing weekly activities, you gain a clear understanding at what level you are engaging in your business on a day-to-day basis. The C.O.R.E. Weekly Action Plan, one of Darice's B.E. tools, provides a crystal clear and very simple way of tracking your communication and relationship activity to help you achieve your annual results.

***** WHERE DO I FIND IT?**

You can download and customize White Board or The C.O.R.E. Weekly Action plan by visiting www.efficiencyessentials.com and selecting the FORMS link.