

ME, INC.

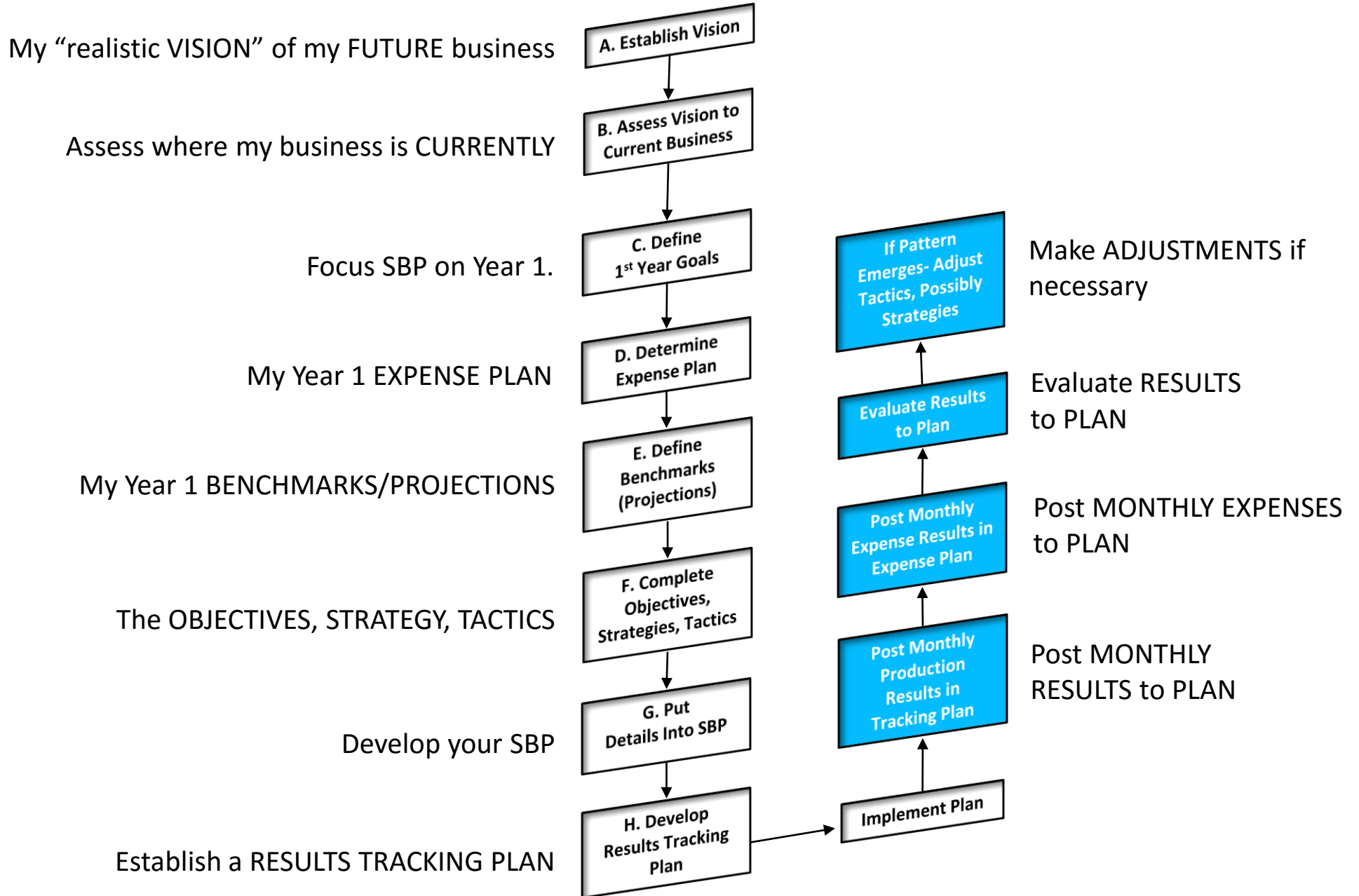
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NOT HAVING A
well-defined **Strategic** BUSINESS PLAN
is a 'primary reason' salespeople fail.

For this training – a reference to SALES PLAN and STRATEGIC BUSINESS PLAN are synonymous.

**What's involved in developing a
STRATEGIC BUSINESS PLAN**

Real Estate Strategic Business Plan (SBP) Process

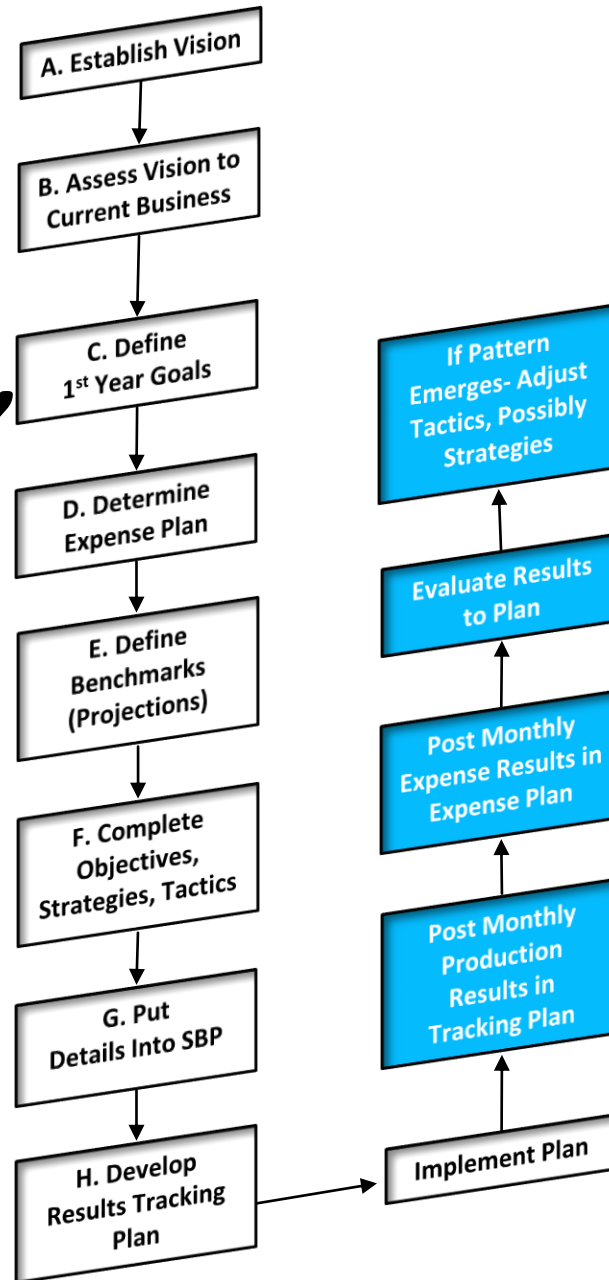


Real Estate Strategic Business Plan (SBP) Process

NOT HAVING A well-defined SBP is a primary reason salespeople fail.

Why?

- Don't know "what to do"
- Don't know "how to do it"
- Don't "care to do it"



TODAY

DEVELOP THE **SALES PLAN** THAT SUPPORTS
ACHIEVING YOUR FINANCIAL PLAN AND VISION

DETERMINE YOUR **FINANCIAL PLAN**

DEFINE THE ***VISION*** FOR YOUR BUSINESS

SUCCESS



SUCCESS



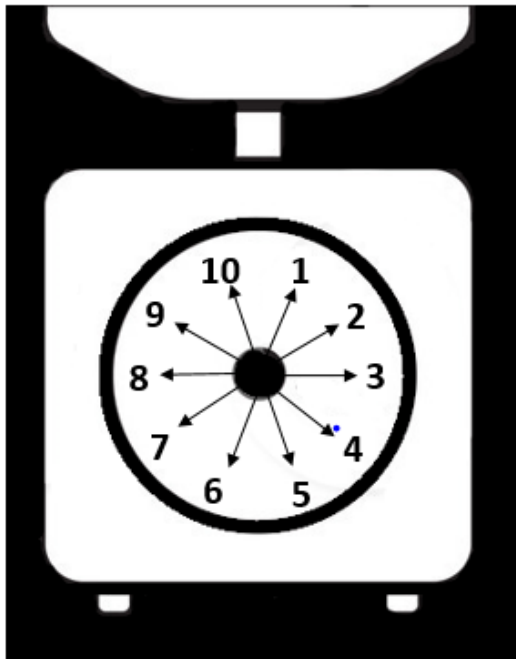
SUCCESS



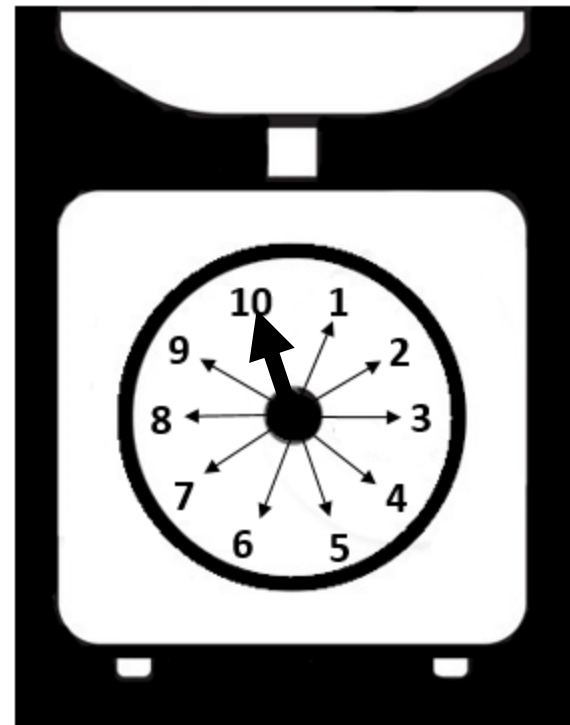


**A STRONG, BARELY
CONTROLLABLE
EXCITEMENT FOR
WHAT YOU DO**

1 – 10...
HOW DO YOU RATE
YOUR **PASSION**



ANYTHING BUT A 10
WILL LIMIT YOUR
SUCCESS!



VISION

brings *clarity* to your business

**an Optometrist changes lenses to bring
clarity to eyesight...**



Vision Assessment

STRATEGIC BUSINESS PLAN VISION ASSESSMENT



A Strategic Business Plan (SBP) addresses the gap between where your business is currently and the *future* Vision you have of your business. Once you have determined your Vision, assessing where your business is currently will give you the starting point of your SBP. Below is an assessment to help you as you consider your Vision, and to help you evaluate where your business is functioning currently.

VISION begins with answering the question...

REALISTICALLY DREAMING...

“What do I want my business to look like in 3 years?”

- What do I want my **INCOME** to be?
- Do I want to work with more **SELLERS** Or more **BUYERS**?
- Do I want to have **SUPPORT STAFF**?
- What **BUSINESS DESIGNATIONS/CERTIFICATES** do I want to have?
- What % of my business do I want from **REFERRALS? REPEAT?**
- ETC.

EVALUATOR		CURRENTLY	VISION
A	LEADERSHIP		
1	I have a clear 3-year Vision for my business		
2	I follow a detailed Strategic Business Plan containing my Goals, Objectives, Strategies, and Tactics to achieve the plan		
B	FINANCIAL		
1	My total income (from business only) =		
2	% Income from Listing / % income from Selling	/	/
	My total expenses (from Expense Plan) =		
a	My total profit =		
3	I make business decisions based on <i>support of Vision and impact on ROI</i>		
4	I conduct regularly scheduled reviews of our key financial indicators, e.g., income statement, balance sheet, cash flow statements, budget		
5	I develop and monitor my annual Expense Plan and cash flow plan in accordance with my Business Plan and Vision		
6	I review financial results monthly and make adjustments based upon trends in order to meet profit expectations		
C	SALES		
1	My total sales volume =		
2	My average income per sale is (total income (divided by) total sales) =		
3	My average cost-per-sale is (total paid expenses (divided by) total closed sales units) =		
4	My average profit-per-closed-sale is (profit (divided by) total closed sales) =		
5	I understand my value propositions		
8	# of total clients/customers =		
a	# clients/customers within my primary market		
b	# clients/customers within my secondary market		
9	I know from what lead source I get my clients/customers (list them - can be FSBO, Expired, Sphere, Farming, Builders, etc.)		
	I know the ROI of each source		
10	% of total clients/customers who are repeat clients/customers =		
11	% of total clients/customers who are referral clients/customers =		
12	I use a Contact Management System to stay in touch with past, current, and potential clients		
13	I know which sales strategies have been successful in producing clients/customers		
D	CLIENT FULLFILMENT		
1	I deliver a “WOW” customer experience		
2	I have a system for monitoring the quality of my/our work		
E	MANAGEMENT		
1	Number of support staff (excluding you) =		
2	I utilize a daily planner system to manage my time		
3	I manage time daily by managing high-value priorities		
4	My balance between work and my personal life (as % - i.e., 75% / 25%)		
5	Professional Designations/Certifications I have (list them)		

**Answer either “YES” or “NO”
or
COMPLETE THE DETAIL**

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2	I follow a detailed Strategic Business Plan containing my Goals, Objectives, Strategies, and Tactics to achieve the plan		
B	FINANCIAL		
1	My total income (from business only) =	\$40K	\$100K
2	% Income from Listing / % income from Selling	50 / 50	70 / 30
	My total expenses (from Expense Plan) =		
a	My total profit =		
3	I make business decisions based on <i>support of Vision and impact on ROI</i>		
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10	% of total clients/customers who are repeat clients/customers =		
11	% of total clients/customers who are referral clients/customers =	8%	20%
12	I use a Contact Management System to stay in touch with past, current, and potential clients	No	Yes
13	I know which sales strategies have been successful in producing clients/customers		
D	CLIENT FULFILLMENT		
1	I deliver a "WOW" customer experience	?	Yes
2	I have a system for monitoring the quality of my/our work		
E	MANAGEMENT		
1	Number of support staff (excluding you) =		
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4	My balance between work and my personal life (as % - i.e., 75% / 25%)		
5	Professional Designations/Certifications I have (list them)	GRI	SRS, SRES

Findings:

- **Income:**
Current = \$40K / Vision = \$100K
- **% income from listings/sales:**
Current = 50%/50% / Vision = 70%/30%
- **Lead sources:**
Current = FSBO, Expired, Sphere, Referral
Vision = Same + Seniors, Farming, Builders
- **Referral business:**
Current = 8% / Vision = 20%
- **Use CMS (contact management system)**
Current = No / Vision = Yes
- **Deliver a "Wow" experience:**
Current ? / Vision = Yes
- **Certifications:**
Current = GRI / Vision = SRS (Seller Representative Specialist) and SRES (Seniors Real Estate Specialist)

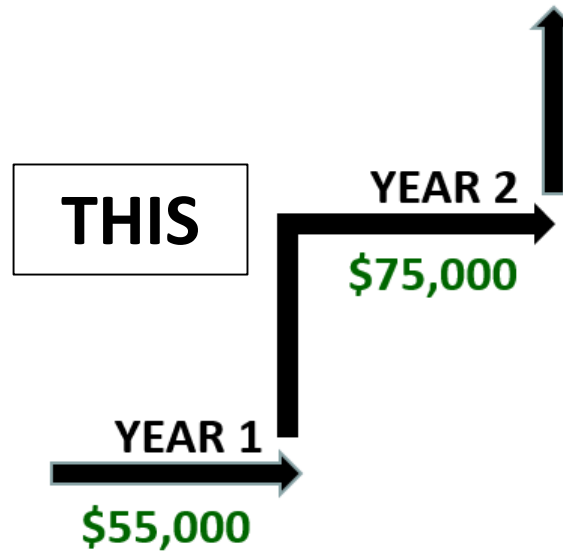
Etc.

Where I Want To Be In 3-Years: **\$100,000**



Where I Am Currently: **\$40,000**

Where I Want To Be In 3-Years: **\$100,000**



Where I Am Currently: **\$40,000**

Vision Assessment

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**If your VISION
will be completed in
3-years, what
needs to be
done in Year 1?**

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- **"Wow" experience:**
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Etc.

STRATEGIC BUSINESS PLAN VISION ASSESSMENT		
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Area	Currently	Vision	YEAR 1
Income	\$40K	\$100K	\$55K
% seller/buyer	50 / 50	70 / 30	60 / 40
Lead source	F, E, S, R,	F, E, S, R, S, Fa, B	F, E, S, R, Fa
% referrals	8%	20%	12%
Use CMS	No	Yes	Yes
Wow experience	?	Yes	Yes
Certifications	GRI	GRI, SRS, SRES	GRI, SRS

What needs to be done in Year 1 will become Strategies & Tactics within your Year 1 SBP

A **FINANCIAL** PLAN

brings *accountability* for your business.

when a business has

MORE BUSINESS REVENUE

THAN EXPENSE

= _____

when a business constantly needs

SUBSIDIZED

TO COVER EXPENSE

= _____

FINANCIAL PLAN

- What are my expenses?
- What is my profit GOAL?

Expenses + Profit = INCOME GOAL

EXPENSE PLAN

TAX EXPENSE / TRANSACTION & INCOME PROJECTIONS

Name: _____
 Covers: 01/01/XX -12/31/XX

PERSONAL

Expense	Monthly \$	Annual \$
Rent or Mortgage		
Automobile Payment(s)		
Home Insurance		
Electric		
Telephone		
Gas		
Water/Sewer/Trash		
Other Utilities		
Auto Insurance		
TV		
Internet/DSL		
Health Insurance		
Medical Expense		
Children school expense		
Clothing		
Entertainment		
Enter an expense		
Enter an expense		
Enter an expense		
Enter an expense		
TOTALS		

If you are going to be responsible for paying any personal expense from your real estate business it needs to be listed under the **PERSONAL EXPENSE CATEGORY**

INCOME / EXPENSE PLAN

REAL ESTATE

Expense	Monthly \$	Annual \$
License	\$ -	\$ -
MLS Dues and Fees	\$ -	\$ -
Business Cards	\$ -	\$ -
Phone or Cell Phone	\$ -	\$ -
Office Rent/Desk Fee	\$ -	\$ -
Auto Expense	\$ -	\$ -
Computer/Internet	\$ -	\$ -
Marketing - Mailers	\$ -	\$ -
Marketing - Web Site	\$ -	\$ -
Marketing - Print	\$ -	\$ -
Marketing - Brochures	\$ -	\$ -
Marketing - Photography	\$ -	\$ -
Marketing - Other	\$ -	\$ -
Marketing - Other	\$ -	\$ -
Organization Dues	\$ -	\$ -
Office Supplies	\$ -	\$ -
Copy Expenses	\$ -	\$ -
Education Expenses	\$ -	\$ -
Client Entertainment/Gifts	\$ -	\$ -
Salary**	\$ -	\$ -
Enter an expense	\$ -	\$ -
TOTALS	\$ -	\$ -
PROFIT	\$ -	\$ -
With PROFIT	\$ -	\$ -

Personal Expense Category

Business Expense Category

Personal Expense-Monthly / Annually

Business Expense Monthly / Annually

Personal Expense Total

Business Expense Total

Planned Taxes

Business Expense Total w Profit

Profit

Combined Expenses w Profit & Taxes

TOTAL PERSONAL + BUSINESS TAXES (i.e., 20%) \$
TOTAL PERSONAL + BUSINESS w TAXES \$4,584 \$55,000

the expenses you are paying from your business in advisable to put a Salary Expense under your Real Estate

EXPENSE PLAN

201X EXPENSE / TRANSACTION & INCOME PROJECTIONS

Name:

Covers: 01/01/XX -12/31/XX

INCOME / EXPENSE PLAN

PERSONAL		
Expense	Monthly \$	Annual \$
Rent or Mortgage	\$ -	\$ -
Automobile Payment(s)	\$ -	\$ -
Home Insurance	\$ -	\$ -
Food	\$ -	\$ -

REAL ESTATE		
Expense	Monthly \$	Annual \$
License	\$ -	\$ -
MLS Dues and Fees	\$ -	\$ -
Business Cards	\$ -	\$ -
Phone or Cell Phone	\$ -	\$ -

If you do not have reasonable access to your past expenses – project what you believe is reasonable & ***TRACK YOUR EXPENSES TO WHAT YOU PROJECT*** to establish your future Expense Plan

Enter an expense	\$ -	\$ -
Enter an expense	\$ -	\$ -
Enter an expense	\$ -	\$ -
TOTALS	\$ -	\$ -

Client Entertainment/Gifts	\$ -	\$ -
Salary**	\$ -	\$ -
Enter an expense	\$ -	\$ -
TOTALS	\$ -	\$ -
PROFIT	\$ -	\$ -
With PROFIT	\$ -	\$ -

TOTAL PERSONAL + BUSINESS	\$ -	\$ -
TAXES (i.e., 20%)	\$ -	\$ -
TOTAL PERSONAL + BUSINESS w TAXES	\$ -	\$ -

Only enter on the Personal Expenses, the expenses you are paying from your business income.

**Check with your Accountant if advisable to put a Salary Expense under your Real Estate Expense.

STRATEGIC BUSINESS PLAN

brings *action* to your business.

WHATEVER YOUR INCOME GOAL IS

*YOU MUST KNOW THE
SPECIFIC DETAILS THAT
WILL PRODUCE YOUR
INCOME GOAL*

GOAL: BETWEEN 1/1 – 12/31/17 BE PAID \$55,000 IN COMMISSION INCOME

HOW MUCH INCOME FROM CLOSED LISTINGS? 60% \$33,000
FROM CLOSED SALES? 40% \$22,000

HOW MANY LISTINGS DO YOU NEED? 16
AT WHAT AVERAGE PRICE? \$ 174,000

**HOW MANY LISTING PRESENTATIONS
DO YOU NEED TO GIVE TO GET THOSE LISTING?** 64

HOW MANY OF THOSE LISTINGS DO YOU NEED TO SELL? 13 (85% Listing Sales Rate)
TO CLOSE? 11 (90% Listing Close Rate)
AT WHAT AVERAGE PRICE? \$ 165,000 (95% Listing Discount Rate)

HOW MANY PROPERTY SALES DO YOU NEED? 10
AT WHAT AVERAGE PRICE? \$ 160,000

**HOW MANY SHOWINGS DO YOU NEED TO
SELL THAT NUMBER OF PROPERTIES?** 80

HOW MANY NEED TO CLOSE? 9 (90% Sales Close Rate)

I need to COMPLETE 64 LISTING PRESENTATIONS to TAKE 16 LISTINGS
at an AVERAGE LIST PRICE of \$174,000.

Of these listings, 13 WILL SELL and 11 WILL CLOSE at an
AVERAGE SALES PRICE of \$165,000.

I need to SHOW 80 PROPERTIES in order to SELL 10 PROPERTIES and
CLOSE 9 PROPERTIES at an AVERAGE SALES PRICE of \$160,000.

The more accurate your detail, the more accurate your projections.

If no **personal history** – use **brokerage history** – If no brokerage history
use **what you believe is a realistic goal**.

*By tracking your actual results, you will have
personal history to reference in the future.*

LISTINGS & SALES PROJECTIONS WORKSHEET

The more accurate the information below, the more accurate your projections. Use your personal real estate listing and sales history if possible. If not available, use your brokerage or office history. If not available, complete the details with what you believe is a realistic goal. By tracking your actual results you will have personal history to reference in the future.

LISTING & SALES PROJECTIONS DETAIL			Subject	Example	Your Details
A					
INCOME					
1	YOUR REAL ESTATE INCOME GOAL - after broker split	Annual Income Goal	\$55,000		
2	% OF INCOME FROM CLOSED LISTINGS ONLY	Closed Listing Income Goal as a %	60%	E	Y
3	% OF INCOME FROM CLOSED SALES ONLY	Closed Sales Income Goal as a %	40%		
4	CLOSED LISTING INCOME GOAL in \$\$\$ (A1 x A2)	Closed Listing Income Goal	\$33,000		
5	CLOSED PROEPRTY SALES INCOME GOAL in \$\$\$ (A1 x A3)	Closed Property Sales Income Goal	\$2,000	X	O
B					
COMMISSION					
1	GROSS BROKERAGE COMMISSION % CHARGED TO LIST OR SELL A PROPERTY	Gross Commission %	6%	A	U
2	LISTING % RETAINED OF YOUR GROSS COMMISSION (B1)	Listing Commission %	55%		
3	SALES % RETAINED OF YOUR GROSS COMMISSION (B1)	Sales Commission %	45%		
4	LISTING COMMISSION % (B2) RETAINED AFTER LISTING BROKER SPLIT (averaged)	Brokerage Retained Listing Commission %	60%	M	R
5	CLOSED PROPERTY SALES COMMISSION % (B3) RETAINED AFTER SELLING BROKER SPLIT (sliding scale needs to be averaged)	Brokerage Retained Sales Commission %	60%		
6	(COMPLETE C1 FIRST) AVERAGE LISTING COMMISSION in \$\$\$ (C1 x B1 x B2 x B4)	Brokerage Avg. Listing Commission	\$3,267	P	
7	(COMPLETE D1 FIRST) AVERAGE PROPERTY SALES COMMISSION in \$\$\$ (D1 x B1 x B3 x B5)	Brokerage Avg. Sales Commission	\$2,592		
C					
LISTINGS TAKEN, SOLD, CLOSED					
1	AVERAGE CLOSED LISTING PRICE (listing side ONLY)	Avg. Closed Listing Price	\$165,000	L	P
2	AVERAGE % DIFFERENCE BETWEEN LAST LIST PRICE & CLOSED LIST PRICE - LISTING DISCOUNT %	Listing Discount %	95%		
3	AVERAGE LISTING PRICE (C1 / C2)	Avg. Brokerage Listing Price	\$3,684	E	L
4	NUMBER CLOSED LISTINGS UNITS REQUIRED TO ACHIEVE CLOSED LISTING INCOME GOAL (A4 / B6)	Required Closed Listings Units	11		
5	% LISTINGS UNITS SOLD THAT CLOSE - LISTING CLOSE RATE (not sell)	Listing Close Rate %	90%		A
6	NUMBER OF LISTING UNITS REQUIRED TO BE SOLD (closed) (C4 / C5)	Required Sold Listings	13		
7	% LISTING UNITS THAT SELL/SOLD - LISTING SOLD RATE (not close)	Listing Sales Rate %	85%		N
8	NUMBER OF LISTING UNITS REQUIRED (C6 / C7)	Required Listing Units	16		
9	AVERAGE NUMBER OF LISTING PRESENTATIONS TO GET 1 LISTING	Listing Presentation to Listing Ratio	4		
10	TOTAL LISTING PRESENTATIONS REQUIRED (C8 x C9)	Total Required Listing Presentations	64		
11	AVERAGE NUMBER OF DAYS TO SELL A LISITING - DAYS ON MARKET (DOM) (days from last listing date to sale date of closed listings ONLY)	Average Listing Days on Market	120		
D					
PROPERTY SOLD, CLOSED					
1	AVERAGE CLOSED PRICE of ALL SOLD PROPERTIES (sale side ONLY)	Avg. Closed Sale Price	\$160,000		
2	NUMBER OF CLOSED PROPERTIES REQUIRED TO ACHIEVE YOUR PROPERTY SALES INCOME GOAL (A5 / B7)	Required Closed Property Sales	9		
3	% OF PROPERTY SALES THAT CLOSE	Sales Close Rate %	90%		
4	NUMBER OF PROPERTIES REQUIRED TO SELL (D2 / D3)	Required Property Sales	10		
5	AVERAGE NUMBER OF PROPERTY SHOWN TO SELL 1 PROPERTY	Properties Shown to Sale	8		
6	PROPERTY SHOWINGS GOAL (D4 x D5)	Properties Shown Goal	80		
7	AVERAGE NUMBER OF DAYS FROM SALE TO CLOSE - PROCESSING DAYS (PD) (closed properties ONLY)	Average Sold Property Processing Days	45		

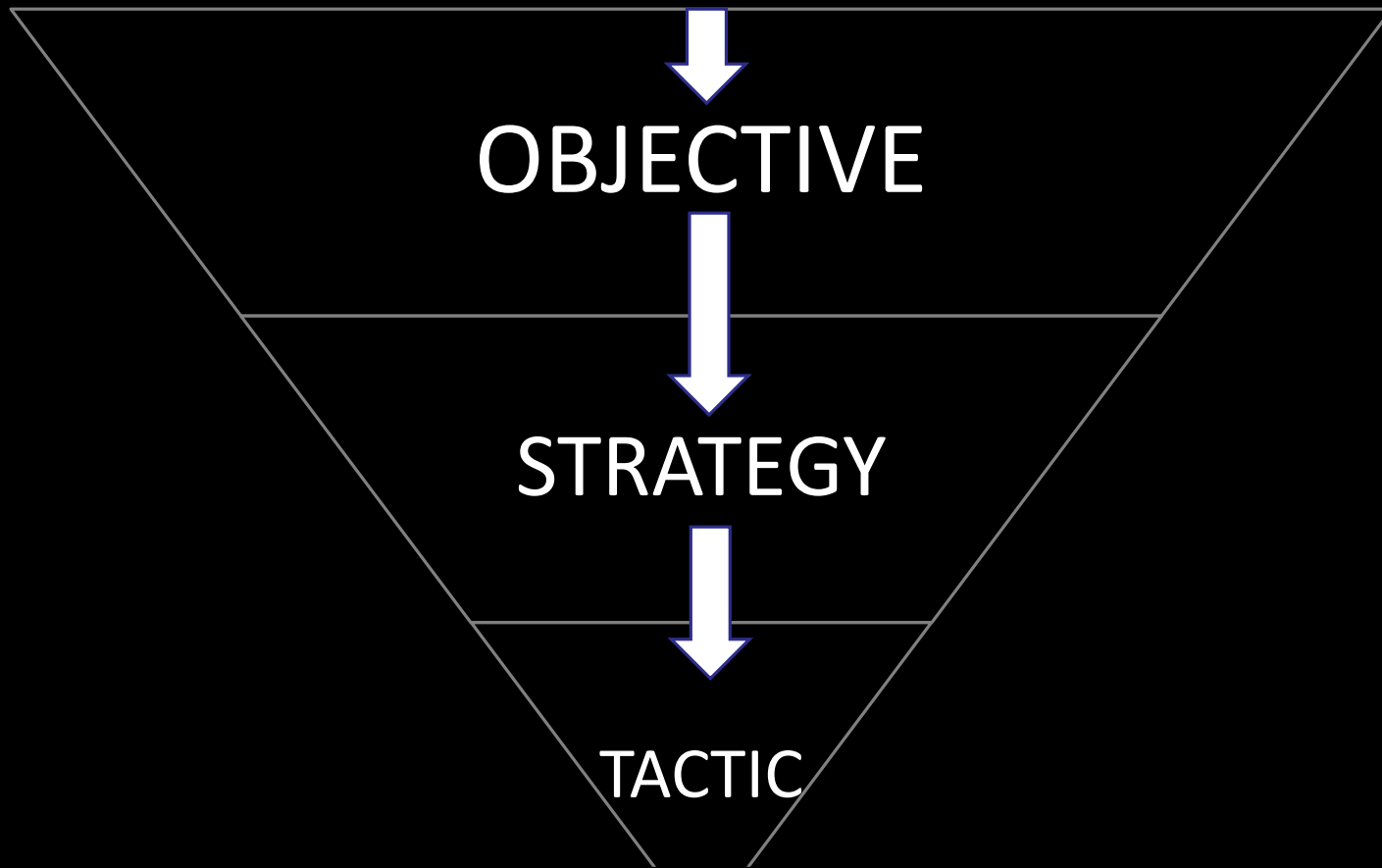
LISTINGS & SALES PROJECTIONS WORKSHEET

LISTING & SALES PROJECTIONS WORKSHEET			GapSolutions	
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3	% OF INCOME GOAL FROM CLOSED SALES ONLY	Closed Sales Income Goal as a %	40%	
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COMMISSION				
1	GROSS BROKERAGE COMMISSION % CHARGED TO LIST OR SELL A PROPERTY	Gross Commission %	6%	
2		Listing Commission %	55%	
3		Sales Commission %	45%	
4	LISTING COMMISSION % (B2) RETAINED	Brokerage Retained Listing Commission %	60%	
5	CLOSED PROPERTY SALES COMMISSION % (B3) RETAINED	Brokerage Retained Sales Commission %	60%	
6	(COMPLETE C)	Brokerage Avg. Listing Commission	\$3,267	
7	(COMPLETE D1 FIRST) A	Brokerage Avg. Sales Commission	\$2,592	
C				
1		Avg. Closed Listing Price	\$165,000	
2	AVERAGE % DIFFERENCE BETWEEN LISTING PRICE AND SOLD PRICE	Listing Discount %	95%	
3		Avg. Brokerage Listing Price	\$173,684	
4	NUMBER CLOSED LISTINGS UNIT	Required Closed Listings Units	11	
5	% LISTINGS SOLD THAT CLOSE - LISTING CLOSE RATE	Listing Close Rate %	90%	
6	NUMBER OF LISTING UNITS REQUIRED TO SELL (sold, not closed) (C4 / C5)	Required Sold Listings	13	
7	% LISTING UNITS THAT SELL/SOLD - LISTING SOLD RATE (not close)	Listing Sales Rate %	85%	
8	NUMBER OF LISTING UNITS REQUIRED (C6 / C7)	Required Listing Units	16	
9	AVERAGE NUMBER OF LISTING PRESENTATIONS TO GET 1 LISTING	Listing Presentation to Listing Ratio	4	
10	TOTAL LISTING PRESENTATIONS REQUIRED (C8 x C9)	Total Required Listing Presentations	64	
11	AVERAGE NUMBER OF DAYS TO SELL A LISITING - DAYS ON MARKET (DOM) (days from last listing date to sale date of closed listings ONLY)	Average Listing Days on Market	120	
D				
PROPERTY SOLD, CLOSED				
1	AVERAGE CLOSED PRICE of ALL SOLD PROPERTIES (sale side ONLY)	Avg. Closed Sale Price	\$160,000	
2	NUMBER OF CLOSED PROPERTIES REQUIRED TO ACHIEVE YOUR PROPERTY SALES INCOME GOAL (A5 / B7)	Required Closed Property Sales	9	
3	% OF PROPERTY SALES THAT CLOSE	Sales Close Rate %	90%	
4	NUMBER OF PROPERTIES REQUIRED TO SELL (D2 / D3)	Required Property Sales	10	
5	AVERAGE NUMBER OF PROPERTY SHOWN TO SELL 1 PROPERTY	Properties Shown to Sale	8	
6	PROPERTY SHOWINGS GOAL (D4 x D5)	Properties Shown Goal	80	
7	AVERAGE NUMBER OF DAYS FROM SALE TO CLOSE - PROCESSING DAYS (PD) (closed properties ONLY)	Average Sold Property Processing Days	45	



Creating your SALES PLAN

SALES PLAN GOAL



RESULTS



GOAL: A PLANNED OUTCOME OF
WHAT YOU WANT TO
ACCOMPLISH WITHIN A
SPECIFIC TIME FRAME

Financial, Education, Career, Personal

Specific - Clearly defined, easily understood

Measurable - How you know you attained it

Attainable - Not too easy / too hard / yet it's achievable

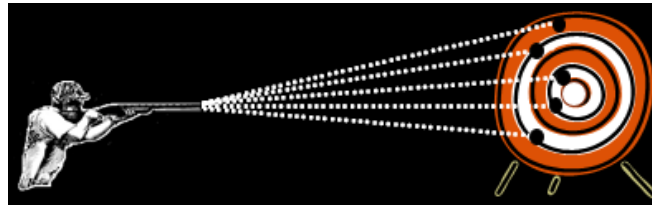
Relevant - Important / meaningful to you.....**do what it takes**

Timely - has a defined end time to achieve it **to achieve it**

GOAL

LOSE WEIGHT EXAMPLE

I want to lose 15 pounds



I will lose 15 pounds *by May 1, 2017*



REAL ESTATE

In the next 12 months I will earn \$55K in sales commission

Between 1/1 – 12/31/17 I will be paid \$55K in sales commission



LOSE WEIGHT

**I WILL LOSE 15
POUNDS BY
MAY 1, 2017**

GOAL

REAL ESTATE

**BETWEEN 1/1 –
12/31/17 I WILL BE
PAID \$55,000**



LOSE WEIGHT

I WILL LOSE 15 POUNDS BY MAY 1, 2017

GOAL

REAL ESTATE

BETWEEN 1/1 – 12/31/17 I WILL BE PAID \$55,000

EXERCISE

OBJECTIVE

COMPLETE 64 LISTING

PRESENTATIONS, TAKE 16 LISTINGS

at an **AVERAGE LIST PRICE** of \$174,000, **13 WILL**

SELL, 11 WILL

CLOSE at an

AVERAGE PRICE of \$165,000.

OBJECTIVE: A SPECIFIC THING YOU WILL FOCUS ON TO ACHIEVE THE GOAL



LOSE WEIGHT

I WILL LOSE 15 POUNDS BY MAY 1, 2017

GOAL

EXERCISE

OBJECTIVE

WALK 10 MILES A WEEK

STRATEGY

REAL ESTATE

BETWEEN 1/1 – 12/31/17 I WILL BE PAID \$55,000

COMPLETE 64 LISTING PRESENTATIONS, TAKE 16 LISTINGS...

LIST FSBO PROPERTIES

STRATEGY: A DESIGNATED TARGET YOU WILL DIRECT YOUR ACTIVITIES/TASKS TOWARDS THAT SUPPORTS YOU ACHIEVING THE OBJECTIVE



LOSE WEIGHT

I WILL LOSE 15
POUNDS BY
MAY 1, 2017

EXERCISE

WALK 10
MILES A WEEK

**WALK 2 MILES
EACH DAY,
MONDAY -
FRIDAY**

REAL ESTATE

GOAL

BETWEEN 1/1 –
12/31/17 I WILL
BE PAID \$55,000

OBJECTIVE

COMPLETE 48 LISTING
PRESENTATIONS, TAKE
12 LISTINGS...

STRATEGY

LIST FSBO
PROPERTIES

TACTIC

**COMPLETE 6
FSBO
PRESENTATIONS
MONTHLY**

**TACTIC: AN ACTIVITY/TASK THAT
MUST BE DONE TO
ACHIEVE A STRATEGY**

LOSE WEIGHT

I WILL LOSE 15
POUNDS BY
MAY 1, 2017

EXERCISE

WALK 10
MILES A WEEK

WALK 2 MILES
EACH DAY,
MONDAY - FRIDAY

REAL ESTATE

GOAL BETWEEN 1/1 –
12/31/17 I WILL
BE PAID **\$55,000**

OBJECTIVE COMPLETE 48 LISTING
PRESENTATIONS, TAKE
12 LISTINGS...

STRATEGY LIST FSBO
PROPERTIES

TACTIC COMPLETE 6 FSBO
PRESENTATIONS
MONTHLY



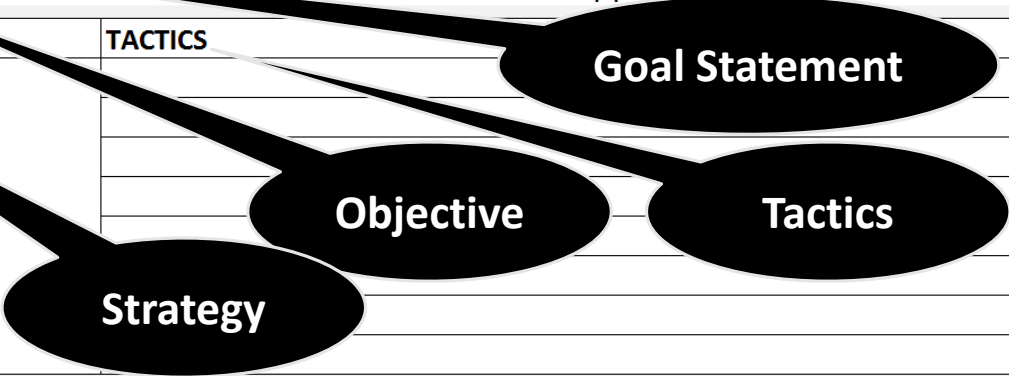
WHEN PUT TOGETHER

SALES PLAN TEMPLATE

GOAL: State the specific GOAL you are supporting **HERE**

OBJECTIVE: State the specific **OBJECTIVE** the STRATEGIES will support **HERE**

<p>STRATEGY 1 State Strategy</p>	<p>TACTICS</p>
<p>STRATEGY 2 State Strategy</p>	<p>TACTICS</p> <p style="text-align: center;">TEMPLATE</p>
<p>STRATEGY 3 State Strategy</p>	<p>TACTICS</p>



1st - Define your SMART Goals

A PLANNED OUTCOME that you want from your business (life).

GOAL: Between 1/1 – 12/31/17 be paid \$55,000

OBJECTIVE:

Area	Currently	Vision	Year 1
Income	\$40K	\$100K ¹	\$55K
% seller/buyer	50 / 50	70 / 30	60 / 40
Lead source	F, E, S, R,	F,E,S,Se,R,Fa	F,E,S,R,Fa
% referrals	8%	20%	12%
Use CMS	No	Yes	Yes
Wow experience	?	Yes	Yes
Certifications	GRI	GRI, SRS, SRES	GRI, SRS

GOAL:

OBJECTIVE:

STRATEGY 1	TACTICS	OWNER	COMPLETE BY
State Strategy			
MARKETING MATERIALS NEEDED TO SUPPORT TACTICS			
STRATEGY 2	TACTICS	OWNER	COMPLETE BY
State Strategy			
MARKETING MATERIALS NEEDED TO SUPPORT TACTICS			
STRATEGY 3	TACTICS	OWNER	COMPLETE BY
State Strategy			
MARKETING MATERIALS NEEDED TO SUPPORT TACTICS			

Goal Statement

2nd – Define Your Objectives

What you will FOCUS on to achieve your goal.

Objective Statement I need to **COMPLETE 64 LISTING PRESENTATIONS** to **TAKE 16 LISTINGS** at an **AVERAGE LIST PRICE** of **\$174,000**.
Of these listings, **13 WILL SELL** and **11 WILL CLOSE** at an **AVERAGE SALES PRICE** of **\$165,000**.

Objective Statement I need to **SHOW 80 PROPERTIES** in order to **SELL 10 PROPERTIES** and **CLOSE 9 PROPERTIES** at an **AVERAGE SALES PRICE** of **\$160,000**.

GOAL:
OBJECTIVE: Complete 64 listing presentations, take 16 listings @ avg. \$174K, sell 13, close 11 @ avg. \$165K

GOAL:
OBJECTIVE:

STRATEGY 1		OWNER	COMPLETE BY
State Strategy			
MARKETING MATERIALS NEEDED TO SUPPORT TACTICS			
STRATEGY 2	TACTICS	OWNER	COMPLETE BY
State Strategy			
MARKETING MATERIALS NEEDED TO SUPPORT TACTICS			
STRATEGY 3	TACTICS	OWNER	COMPLETE BY
State Strategy			
MARKETING MATERIALS NEEDED TO SUPPORT TACTICS			

3rd - Define Your Strategies

The TARGETS you will direct your effort and energy towards which support you achieving each objective.

Area	Currently	Vision	YEAR 1
Income	\$40K	\$100K	\$55K
% seller/buyer	50 / 50	70 / 30	60 / 40
Lead source	F, E, S, R,	F, E, S, R, S, Fa, B	F, E, S, R, Fa
% referrals	8%	20%	12%
Use CMS	No	Yes	Yes
Wow experience	?	Yes	Yes
Certifications	GRI	GRI, SRS, SRES	GRI, SRS

What needs to be done in Year 1 will become Strategies & Tactics within your Year 1 SBP

Objective: I need to **COMPLETE 64 LISTING PRESENTATIONS** to **TAKE 16 LISTINGS** at an **AVERAGE LIST PRICE** of \$174,000. Of these listings, **13 WILL SELL** and **11 WILL CLOSE** at an **AVERAGE SALES PRICE** of \$165,000.

Objective: I need to **SHOW 80 PROPERTIES** in order to **SELL 10 PROPERTIES** and **CLOSE 9 PROPERTIES** at an **AVERAGE SALES PRICE** of \$160,000.

Area	Year 1
Income	\$55K
% seller/buyer	60 / 40
Lead source	F,E,S,R,Fa
% referrals	12%
Use CMS	Yes
Wow experience	Yes
Certifications	GRI, SRS

GOAL:
OBJECTIVE:

STRATEGY 1	TACTICS	OWNER	COMPLETE BY
			
MARKETING MATERIALS NEEDED TO SUPPORT TACTICS			
STRATEGY 2	TACTICS	OWNER	COMPLETE BY
State Strategy			
MARKETING MATERIALS NEEDED TO SUPPORT TACTICS			
STRATEGY 3	TACTICS	OWNER	COMPLETE BY
State Strategy			
MARKETING MATERIALS NEEDED TO SUPPORT TACTICS			

4th - Define Each Strategy's Tactics

The ACTIVITIES you need to complete to achieve each strategy.

Example for activities supporting FSBO: Call 3 new FSBO weekly. This then requires supporting activities like:

- weekly review FSBO website and enter contact info into your Contact Management System;
- determine how you will contact them- in-person or phone;
- what will be your approach and message;
- what materials do you need that support your message, etc.

GOAL:
OBJECTIVE:

STRATEGY 1	TACTICS	OWNER	COMPLETE BY
MARKETING MATERIALS NEEDED TO SUPPORT TACTICS			
STRATEGY 2	TACTICS		COMPLETE BY
State Strategy			
MARKETING MATERIALS NEEDED TO SUPPORT TACTICS			
STRATEGY 3	TACTICS	OWNER	COMPLETE BY
State Strategy			
MARKETING MATERIALS NEEDED TO SUPPORT TACTICS			

Tactics

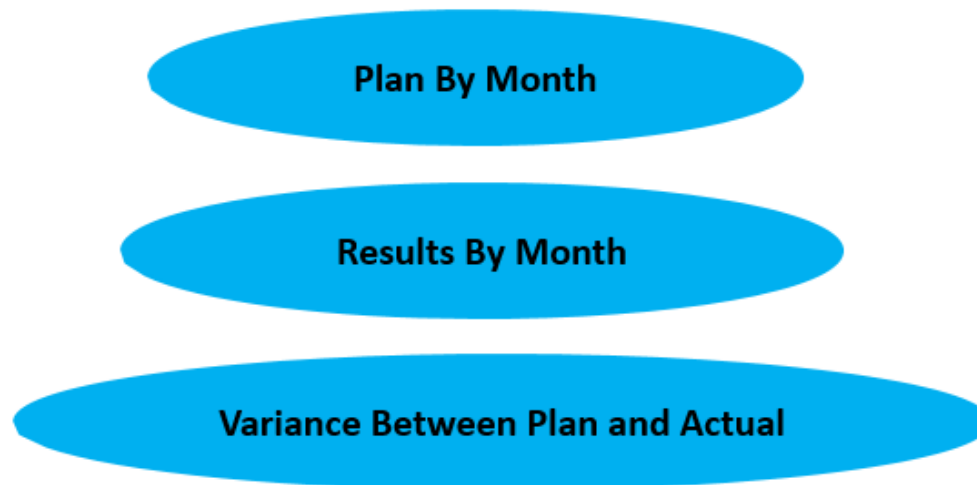
Owner

Complete By

5th - Determine Your RESULTS TRACKING PLAN

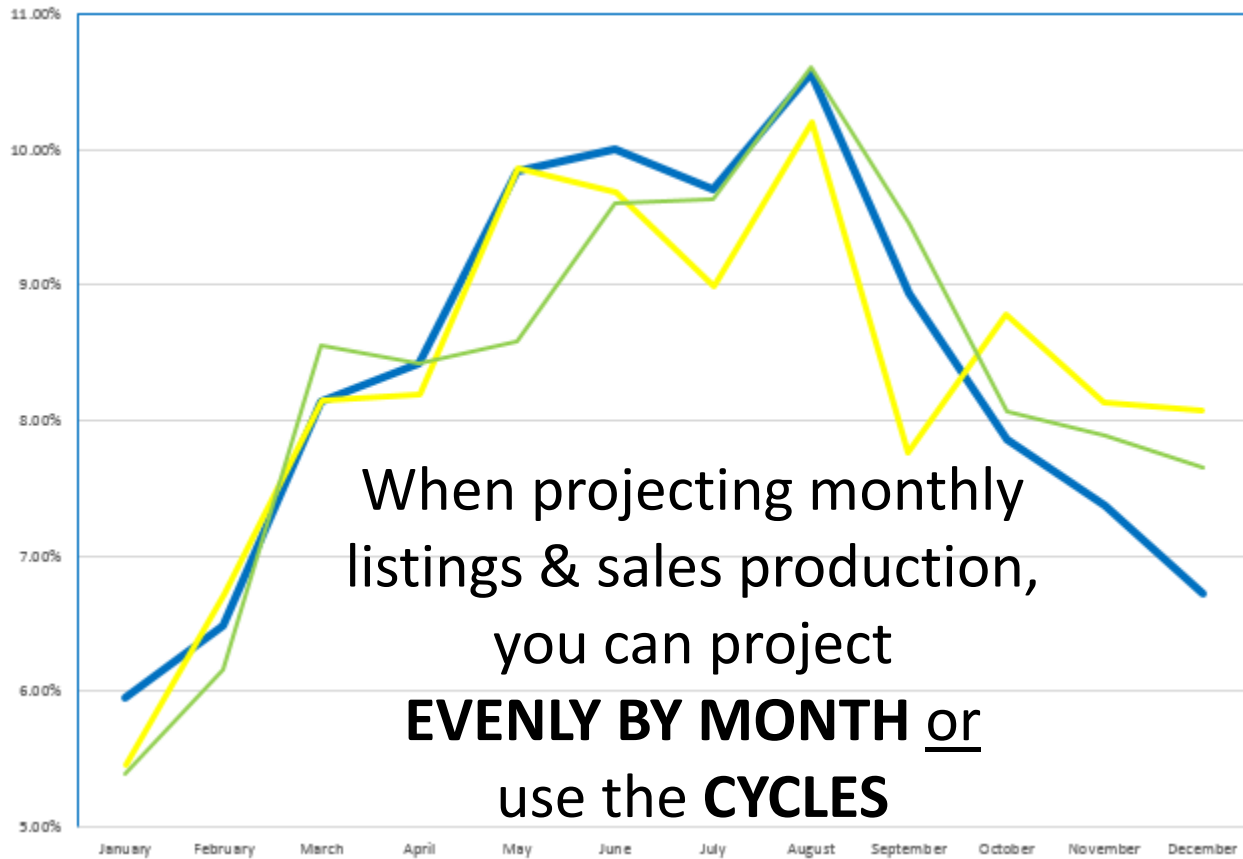
TRACK- Actual Results compared to Your Plan and the VARIANCE between Actual and Plan.

By MONITORING MONTHLY you have time to make adjustments to your tactics.



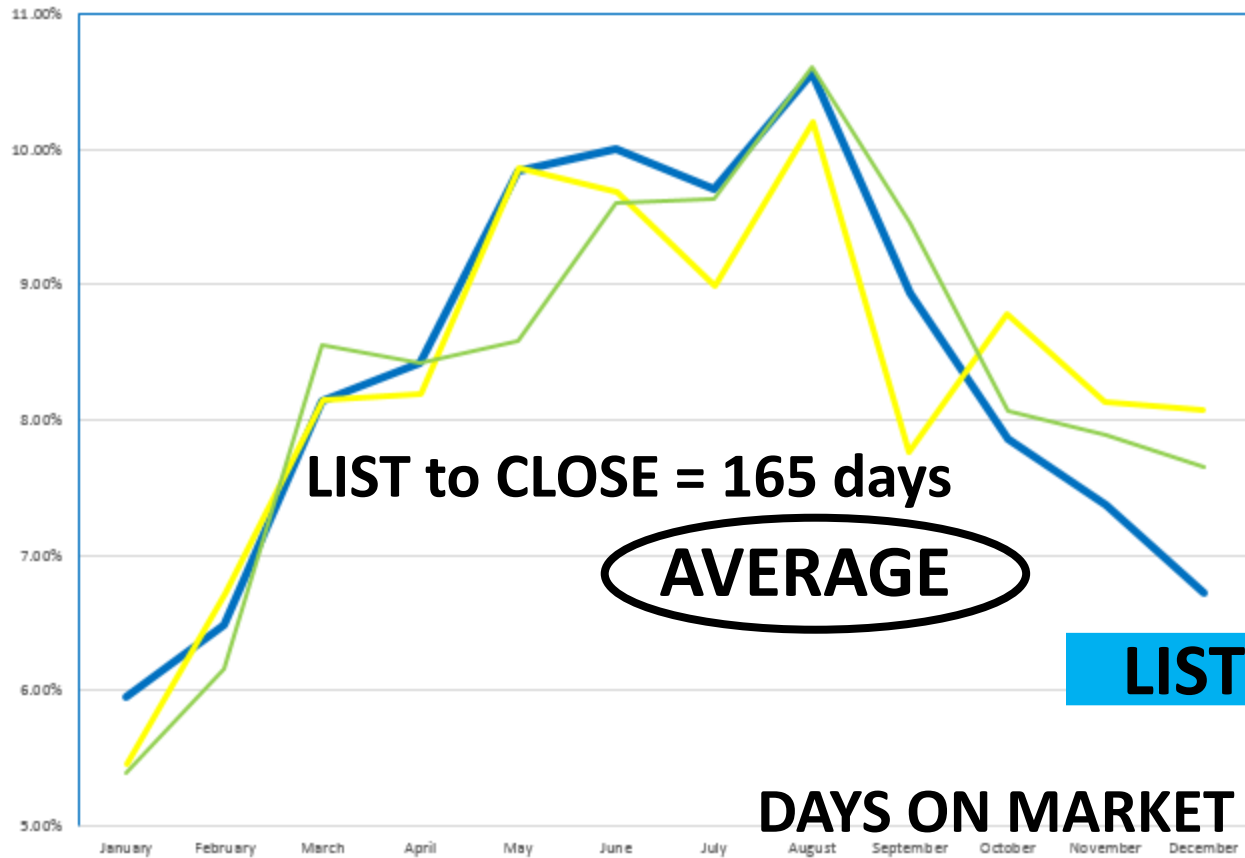
The VARIANCE gives you a running total at a glance between where you planned to be and where you actually are.

While the number of sold units varies annually, there is a pattern of which month the units close.



Jan	5.63%
Feb	6.47%
Mar	8.26%
Apr	8.34%
May	9.50%
Jun	9.78%
Jul	9.44%
Aug	10.46%
Sept	8.69%
Oct	8.22%
Nov	7.77%
Dec	7.43%

REAL ESTATE IS A CYCLICAL BUSINESS



Jan	5.63%
Feb	6.47%
Mar	8.26%
Apr	8.34%
May	9.50%
Jun	9.78%
Jul	9.44%
Aug	10.46%
Sept	8.69%
Oct	8.22%
Nov	7.77%
Dec	7.43%
Jan 2017	

Listings & Sales Projections & Results Tracking Example

Monthly Projection %'s
(disregard if spreading evenly)

Monthly Plan

Monthly Actual

Y-T-D MONTH

Y-T-D CUMULATIVE

LISTINGS

REAL ESTATE SALES PLAN AND RESULTS- EXAMPLE

Month	Monthly Production %	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total	
		5.63%	6.47%	8.26%	8.34%	9.50%	9.78%	9.44%	10.46%	8.69%	8.22%	7.77%	7.43%					100%	
Listing Unit PLAN	Listing Presentation Plan	4	8	8	8	8	8	8	12	8	8	8	8					96	
	Listing Unit Plan	1	2	2	2	2	2	2	5	2	2	2	2	BEGIN NEW YEAR PLAN				24	
	Listing Volume Plan	\$197,000	\$394,000	\$394,000	\$394,000	\$394,000	\$394,000	\$394,000	\$591,000	\$394,000	\$394,000	\$394,000	\$394,000	BEGIN NEW YEAR PLAN				\$4,728,000	
	Avg. Listing Price Plan													BEGIN NEW YEAR PLAN				\$197,000	
Actual Listings Taken	Listing Presentations Given	5	8	1	2	3	0	0	0	0	0	0	0	0	0	0	0	0	19
	Listing Units Taken	1	2	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	6
	Listing Volume Total	\$250,000	\$635,000	\$185,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,270,000
	Avg. Listing Price Taken	\$250,000	\$211,667	\$185,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$211,667
VARIANCE TO PLAN	Listing Presentations MONTH	1	0	-7	-6	-5	-8	-8	-12	-8	-8	-8	-8	BEGIN NEW YEAR PLAN					
	Listings Units MONTH	0	1	-1	-2	-1	-2	-2	-3	-2	-2	-2	-2	BEGIN NEW YEAR PLAN					
	Listing Volume MONTH	\$53,000	\$241,000	-\$209,000	-\$394,000	-\$194,000	-\$394,000	-\$394,000	-\$591,000	-\$394,000	-\$394,000	-\$394,000	-\$394,000	-\$394,000	BEGIN NEW YEAR PLAN				
	Listing Presentations Y-T-D	1	1	-6	-12	-17	-25	-33	-45	-53	-61	-69	-77	BEGIN NEW YEAR PLAN				-396	
Listings Units Y-T-D	0	1	0	-2	-3	-5	-7	-10	-12	-14	-16	-18	BEGIN NEW YEAR PLAN				-86		
Listing Volume Y-T-D	\$53,000	\$294,000	\$85,000	-\$309,000	-\$503,000	-\$897,000	-\$1,291,000	-\$1,882,000	-\$2,276,000	-\$2,670,000	-\$3,064,000	-\$3,458,000	BEGIN NEW YEAR PLAN				-15918000		
Listings Sold PLAN	Listings Units Sold Plan	CURRENT YEAR PLAN		2	1	1	1	2	2	3	2	2	2	1	1	BEGIN NEW YEAR PLAN		20	
	Listing Sold Volume Total Plan	CURRENT YEAR PLAN		\$370,000	\$185,000	\$185,000	\$185,000	\$370,000	\$370,000	\$555,000	\$370,000	\$370,000	\$370,000	\$185,000	\$185,000	BEGIN NEW YEAR PLAN		\$3,700,000	
	Avg. Listing Sold Price Plan	CURRENT YEAR PLAN														BEGIN NEW YEAR PLAN		\$185,000	
	Actual Listings Sold	0	0	2	0	1	0	0	0	0	0	0	0	0	0	0	0	0	3
Listing Sold Volume Total	0	0	\$325,000	\$0	\$180,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$505,000	
Avg. Listing Sold Price	\$0	\$0	\$162,500	\$0	\$180,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$168,333	
VARIANCE TO PLAN	Listings Units Sold MONTH	CURRENT YEAR PLAN		0	-1	0	-1	-2	-2	-3	-2	-2	-2	-1	-1	BEGIN NEW YEAR PLAN			
	Listing Sold Volume MONTH	CURRENT YEAR PLAN		-\$45,000	-\$185,000	-\$5,000	-\$185,000	-\$370,000	-\$370,000	-\$555,000	-\$370,000	-\$370,000	-\$370,000	-\$185,000	-\$185,000	BEGIN NEW YEAR PLAN			
	Listings Units Sold Y-T-D	CURRENT YEAR PLAN		0	-1	-1	-2	-4	-6	-9	-11	-13	-15	-16	-17	BEGIN NEW YEAR PLAN		-95	
	Listing Sold Volume Y-T-D	CURRENT YEAR PLAN		-\$45,000	-\$230,000	-\$235,000	-\$420,000	-\$790,000	-\$1,160,000	-\$1,715,000	-\$2,085,000	-\$2,455,000	-\$2,825,000	-\$3,010,000	-\$3,195,000	BEGIN NEW YEAR PLAN		-\$18,165,000	
Listings Closed PLAN	Listings Units Closed Plan	CURRENT YEAR PLAN		2	1	1	2	1	2	1	2	1	1	1	1	1	0	14	
	Listings Closed Volume Plan	CURRENT YEAR PLAN		\$370,000	\$185,000	\$185,000	\$370,000	\$185,000	\$370,000	\$185,000	\$370,000	\$185,000	\$185,000	\$185,000	\$185,000	\$185,000	\$0	\$2,590,000	
	Avg. Listing Closed Price Plan	CURRENT YEAR PLAN																\$185,000	
	Actual Listings Closed	0	0	0	0	2	0	0	0	0	0	0	0	0	0	0	0	2	
Listings Closed Volume	0	0	\$325,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$325,000	
Avg. Listing Closed Price	\$0	\$0	\$162,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$162,500	
VARIANCE TO PLAN	Listings Units Closed MONTH	CURRENT YEAR PLAN		0	-1	-1	-2	-1	-2	-1	-1	-1	-1	-1	-1	-1	0		
	Listings Closed Volume MONTH	CURRENT YEAR PLAN		-\$45,000	-\$185,000	-\$185,000	-\$370,000	-\$185,000	-\$370,000	-\$185,000	-\$370,000	-\$185,000	-\$185,000	-\$185,000	-\$185,000	-\$185,000	-\$185,000	\$0	
	Listings Units Closed Y-T-D	CURRENT YEAR PLAN		0	-1	-2	-4	-5	-7	-8	-9	-10	-11	-12	-12	-12	-12	-81	
	Listings Closed Volume Y-T-D	CURRENT YEAR PLAN		-\$45,000	-\$230,000	-\$415,000	-\$785,000	-\$970,000	-\$1,340,000	-\$1,525,000	-\$1,710,000	-\$1,895,000	-\$2,080,000	-\$2,265,000	-\$2,265,000	-\$2,265,000	-\$2,265,000	-\$15,525,000	

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Tracking includes
**PROPERTY SALES &
PROPERTY CLOSED**

Added Benefit of Tracking

***Results* information will give you valuable insight into:**

- Areas where you can focus on for personal skill development
- Details for developing your next year's plan

**Why TRACKING is so important-
you still have time to make changes.**



and GOOD SELLING!