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# ESTABLISHING YOUR VISION:

## ACTIVITY VS PURPOSE : EXERCISE

- THE DIFFERENCE BETWEEN DOING ACTIVITIES & DOING ACTIVITIES WITH A PURPOSE - FIND YOUR PURPOSE

## SWOT ANALYSIS:

- STRENGTHS, WEAKNESS, OPPORTUNITIES, & THREATS

## ACTION PLANNING:

- WRITE DOWN WHERE YOU WANT YOUR BUSINESS TO BE NEXT YEAR. WHAT ARE 3 THINGS YOU CAN CONTROL TO GET THERE?

## STRENGTHS:

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## WEAKNESS:

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## OPPORTUNITIES:

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## THREATS:

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## NEXT YEAR VISION:

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## THINGS I CAN CONTROL:

- 1.
- 2.
- 3.



# TARGET AUDIENCE

IDENTITY: WHO IS YOUR IDEAL CLIENT?

- WHAT MAKES THEM AN IDEAL CLIENT?
- WHY DO YOU WANT TO WORK WITH THEM?

IDEAL CLIENT:

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WHAT ARE 3 THINGS YOU CAN DO TO MARKET TO THIS CLIENT RIGHT NOW?

- 1.
- 2.
- 3.

WHAT COMMON NEEDS DOES THIS TYPE OF CLIENT HAVE?

- 1.
- 2.
- 3.
- 4.



# PROSPECTING STRATEGIES

## ONLINE CLIENT GENERATION

1. WEBSITE AND SEO
2. SOCIAL MEDIA MARKETING:
3. EMAIL MARKETING:
4. CONTENT MARKETING/VIDEO/YOUTUBE
5. ONLINE ADVERTISING/ PAID ADS
6. SOCIAL MEDIA ADVERTISING:
7. GUEST BLOGGING OR CREATE YOUR OWN
8. WEBINARS AND ONLINE WORKSHOPS:
9. LEAD MAGNETS/ CALLS TO ACTION:
10. ONLINE DIRECTORIES
11. YOUTUBE CHANNEL:
12. ONLINE FORUMS AND COMMUNITIES
13. LINKEDIN OUTREACH
14. REVIEW MANAGEMENT
15. ONLINE PARTNERSHIPS:
16. GOOGLE MY BUSINESS
17. SOCIAL MEDIA ENGAGEMENT
18. ONLINE CONTESTS AND GIVEAWAYS
19. ONLINE NEWSLETTERS
20. RETARGETING CAMPAIGNS

## OFFLINE CLIENT GENERATION:

1. NETWORKING EVENTS:
2. LOCAL CHAMBERS OF COMMERCE
3. REFERRAL PROGRAMS OR REFERRAL NETWORK
4. LOCAL ADVERTISING(NEWSPAPER, BOARDS, ETC)
5. DIRECT MAIL
6. DOOR KNOCKING:
7. COMMUNITY SPONSORSHIPS(TEAMS, SCHOOLS, ETC):
8. LOCAL RADIO AND TV
9. EXPIREDS/ CANCELLED'S
10. EDUCATIONAL WORKSHOPS
11. LEAD LAKE OR COLD CALLS
12. LOCAL BUSINESSES & PARTNERSHIPS
13. CLIENT APPRECIATION EVENTS
14. PRINTED MARKETING MATERIALS
15. LOCAL NETWORKING GROUPS
16. COMMUNITY ENGAGEMENT
17. LOCAL TRADE SHOWS
18. LOCAL SPEAKING ENGAGEMENTS
19. LOCAL POSTERS AND SIGNS
20. VEHICLE ADVERTISING



# LEADS & SOURCES



LEAD SOURCES ARE THE KEY TO UNDERSTANDING WHERE YOUR DEALS COME FROM. UNDERSTANDING THE LEAD SOURCES AND HOW YOU GENERATE BUSINESS IS GOING TO HELP YOU GAGE YOUR BUSINESS PLAN.



## MAIN SOURCES



SPHERE  
PAST CLIENTS  
REFERRALS  
OPEN HOUSES/MODEL  
TEAM / PAID LEADS  
AGENT REFERRALS  
COLD CALLS  
CANCELLED & EXPIRED  
NEW CONSTRUCTION  
ETC.



## SUPPORTING SOURCES



SOCIAL MEDIA  
CIRCLE PROSPECTING  
FARMING  
CLIENT APPRECIATION EVENTS  
NETWORKING  
MAIL/EMAIL CAMPAIGNS  
SHOWING AGENT MODEL  
ETC.

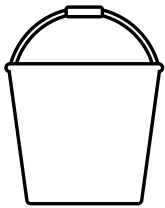
# BUCKETS OF BUSINESS

BUCKETS OF BUSINESS ARE THE FUNNELS IN WHICH YOU GENERATE DEALS FROM. THIS IS A CRUCIAL PART OF YOUR BUSINESS PLAN AND WILL HELP YOU IDENTIFY WHERE TO SPEND YOUR TIME.



**AFTER CREATING YOUR 3 DEFINED BUCKETS OF BUSINESS, YOU WILL HAVE 2 SUPPORTING BUCKETS THAT WILL CONTRIBUTE TO ALL 3 BUCKETS. (EXAMPLE- SOCIAL MEDIA, CIRCLE PROSPECTING, FARMING ETC) THESE SUPPORTING BUCKETS WILL HELP FUEL THE MAIN 3 BUCKETS OF BUSINESS.**

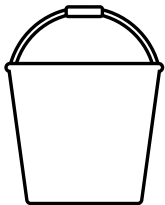
## SUPPORTING BUCKETS:



1.

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2.

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# DEFINING BUCKETS

WHAT ARE YOU GOING TO DO WITHIN EACH BUCKET TO GENERATE CLIENTS:



- 1.
- 2.
- 3.

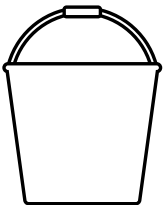


- 1.
- 2.
- 3.



- 1.
- 2.
- 3.

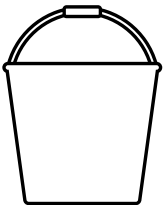
## SUPPORTING BUCKETS DEFINED:



1.

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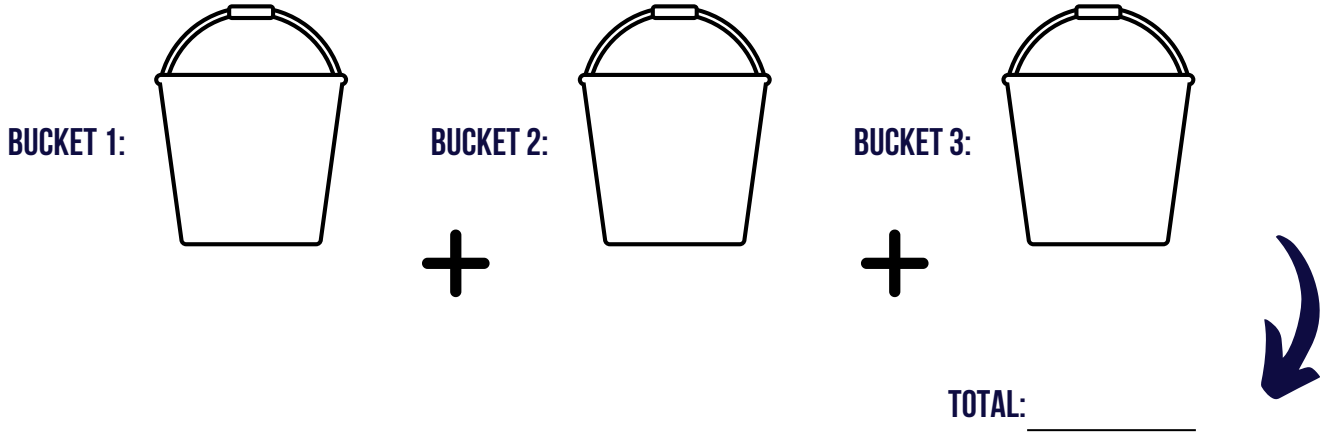
2.

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# GOALS & OBJECTIVES:

LET'S REVERSE ENGINEER OUR GOALS FROM BUSINESS BUCKETS. EACH BUCKET WILL GENERATE A CERTAIN AMOUNT OF BUSINESS. PLUG IN THE NUMBER OF DEALS YOU PLAN ON PRODUCING IN EACH BUCKET



| TOTAL AMOUNT OF YOUR TIME SPENT:     | HOURS PER WEEK: |
|--------------------------------------|-----------------|
| HIGHEST PRODUCING BUCKET: <u>50%</u> | _____           |
| MIDDLE BUCKET: <u>30%</u>            | _____           |
| LOWEST BUCKET: <u>20%</u>            | _____           |

## WEEKLY CHECKLIST:

MOST MISTAKES AROUND A BUSINESS PLAN ARE THE TRANSACTIONAL GOALS. THE WAY TO AVOID GETTING SIDE TRACKED AND STAY ON PACE FOR YOUR GOAL IS TO FOCUS ON THE ACTIONS. A WEEKLY CHECKLIST IS DESIGNED TO FOCUS ON THE ACTIONS THAT PRODUCE RESULTS. CONSISTENT ACTIONS CAN PRODUCE CONSISTENT RESULTS.



# WEEKLY CHECKLIST

|  |   |   |
|--|---|---|
| <b>TASKS:</b><br>_____<br>_____<br>_____<br>_____<br>_____   |   | <b>HOME SEARCH:</b><br><br>1.<br><br>2.<br><br>3.<br><br>4.<br><br>5.   |
| <b>SPHERE FOLLOWUP:</b><br><br>1.<br><br>2.<br><br>3.<br><br>4.<br><br>5.  | <b>PROSPECTING DAYS &amp; TYPE:</b><br><br>1.<br><br>2.<br><br>3. | <b>SOCIAL POSTS</b>   |
| <b>EDUCATION FOR THE WEEK:</b><br><br>_____<br><br>_____<br><br>_____<br><br><b>NOTES</b><br><br>_____<br><br>_____<br><br>_____ |   | <b>CRM &amp; EMAIL CLEAN</b><br><br><input type="checkbox"/> MONDAY<br><input type="checkbox"/> TUESDAY<br><input type="checkbox"/> WEDNESDAY<br><input type="checkbox"/> THURSDAY<br><input type="checkbox"/> FRIDAY<br><input type="checkbox"/> SATURDAY<br><input type="checkbox"/> SUNDAY |



# KPI'S: ACCOUNTABILITY & COMMITMENT

WHAT ARE YOU COMMITTING TO FOR 2024 BOTH  
PERSONALLY & PROFESSIONALLY?

PERSONAL COMMITMENT:

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PROFESSIONAL COMMITMENT:

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KPI - KEY PERFORMANCE INDICATORS

WHAT ARE YOU GOING TO TRACK THIS YEAR?

WHAT METRICS ARE YOU GOING TO USE FOR YOUR BUSINESS?

HOW DO YOU WANT TO BE HELD ACCOUNTABLE THIS YEAR?

KPI'S:

- 1.
- 2.
- 3.
- 4.
- 5.

ACCOUNTABILITY:

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# CONCLUSION

HOW ARE YOU GOING TO GENERATE BUSINESS FROM YOUR SOURCES?  
A PLAN IS ONLY GOOD WITH EXECUTION. HOW ARE YOU GOING TO EXECUTE?

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- 80% - A - ACTIVITIES: ALL PRODUCTION BASED ACTIVITIES(WORKING IN YOUR BUSINESS)
- 10% - B - ACTIVITIES: PERTAIN TO GROWTH AND SYSTEMS(WORKING ON YOUR BUSINESS)
- 10% - C - ACTIVITIES: PERTAIN TO PERFECTING YOUR CRAFT & INCREASING KNOWLEDGE



THESE NUMBERS WILL BE DIFFERENT DEPENDING ON WHERE YOU ARE IN YOUR BUSINESS

## OPTIMIZING YOUR SCHEDULE:

3-4 HOUR OFFICE SHIFTS: 4 DAYS A WEEK MINIMUM  
TIME BLOCK YOUR SHIFTS: PLUG IN THE APPROPRIATE ACTIVITY TYPE  
COORDINATE FIELD WORK EFFECTIVELY AND PREPARE BLOCKS FOR IT

AND FINALLY..... **EXECUTE.**

