SBUSINESS SPLANNING

AGENT PACKET



REFLECTING ON 2024

Your real estate business has the ability to fund your ideal lifestyle.

Before focusing on where we are going, let's reflect on where we have been.

What are some of the significant and defining	g moment	s over the last	year?	
Which 3 moments are you the most proud of	f overall?			
f you could sum up 2024 in one word:				

"Success is a series of small victories." - Jaime Tardy

"Courage starts by showing up and letting ourselves be seen." - Brené Brown



YOUR EXPENSES TO SURVIVE

PERSONAL EXPENSES

PERSUNAL EXPENSES				
Mortgage				
Utilities				
Food				
Insurance				
Medical				
Car Payment				
Credit Card				
Gifts				
Entertainment				
Pets				
TOTAL \$				

BUSINESS EXPENSES

TOTAL \$				
Photography				
Signs				
Business Cards				
Marketing				
Gas				
Phone				
Technology				
Office				
MLS				
Board Fees				

TOTAL NET AMOUNT NEEDED TO SURVIVE

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S.W.O.T. ANALYSIS

Understanding your strengths, weaknesses, opportunities, and threats.

Use the chart below to help fill out your own SWOT analysis on the next page.

STRENGTHS (internal)

What are your personal advantages?

What advantages does your company have?

What do you do better than anyone else?

What factors mean that you "get the sale"?

What do others people see as your strengths?

Consider this from your perspective and from the perspective of the people you serve. Be realistic.



OPPORTUNITIES (external)

Changes in government policy related to your field changes in social patterns, population, lifestyle changes.

What interesting trends are you aware of?

Changes in technology

Local events

Look at your strengths and ask if those open up any opportunities.

Look at your weaknesses and ask yourself if you could open up opportunities by outsourcing or eliminating them.



WEAKNESSES (internal)

What could you improve?

What should you avoid?

What factors lose you sales?

What do you do poorly?

Consider this from an internal and external basis.

Do other people seem to perceive weaknesses that you don't?

What are your competitors doing better than you?



What obstacles do you face?

What are your competitors doing?

Are your job requirements changing?

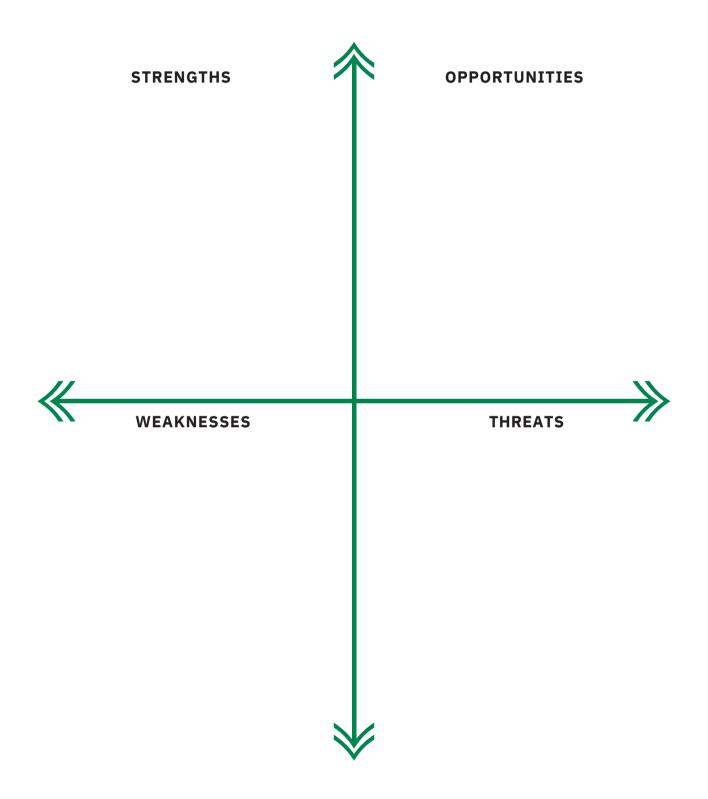
Could any of your weaknesses threaten your business?

Do you have financial problems?

Threats are things that we should be aware of, but they are not usually things that we have control over.



S.W.O.T. ANALYSIS—

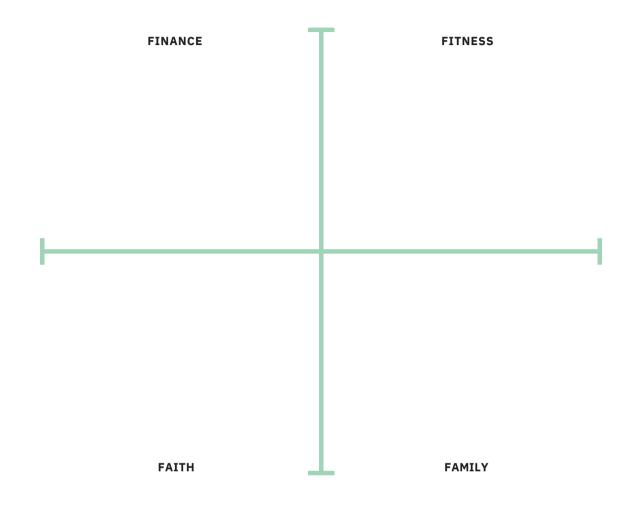


STRATEGIC PLAN

To reach our goals and run our business effectively, we have to make a plan and follow it. Here are some steps toward a Strategic Plan for your business:

1. What do I want to achieve in my business in 5 years?
2. What do I want to achieve in my life in 5 years?
3. If I had to give a 10 minute TEDx talk on something in my business, what would it be on?
4. What is the biggest pain in my business right now?
5. What qualities in my life are my biggest strengths?
6. What are my biggest weaknesses as a leader/ business owner?

FOUNDATION PRINCIPLES













CCESS SIGNIFICANCE

YOUR VALUES ASSESSMENT -

Choose 16 values that best align with you.

Economy

Efficiency

Empathy

Self-Reliance Accountability Enjoyment Justice Selfishness Accuracy Equitableness Kindness Achievement Leadership Sensitivity Excitement Service Adaptability Exploration Legacy Ambition **Fairness** Simplicity Love Faithfulness Appreciation Loyalty Sincerity Attentiveness Family Mastery Speed **Availability** Fearlessness Meekness Spontaneity Mercifulness Balance Fidelity Stability Belonging **Fitness** Obedience Strategic **Boldness** Flexibility Observance Strength Calmness Forgiveness Openness Structure Cheerfulness Freedom Submissiveness Optimism Friendliness Commitment Oriented Success Fun Compassion Originality Support **Tactfulness** Generosity Patience Concern Peacefulness Teamwork Confidence Gentleness Consideration Goodness Persuasiveness Temperance Grace Positivity Thankfulness Consistency Gratitude Thoroughness Contentment Preparedness Professionalism Control Growth Thoughtfulness Thriftiness **Happiness** Prudence Cooperation Hard Punctuality **Timeliness** Courage Tolerance Harmony Purpose Creativity Health Trustworthiness Decisiveness Quality Truthfulness Deference Reliability Honesty Resourcefulness Understanding Dependability Humility Determination Independence Respect Uniqueness Responsibility Unity Diligence Ingenuity Restraint Usefulness Discipline Inner Discretion Results Virtue Integrity

Security

Self-Actualization

Self-Control

Intelligence

Intuition

Joyfulness

Vision

Vitality Work

YOUR VALUES ASSESSMENT



YOUR VISION ASSESSMENT

"Sight is what you see with your eyes, vision is what you see with your mind." - Robert T. Kiyosaki

Looking out to December 31, 2025

PERSONAL

BUSINESS

FAMILY/RELATIONSHIPS

HEALTH/RECREATION

YOUR

BLANK CANVAS



YOUR EXPENSES TO THRIVE

BIG WHY EXPENSES

BIG WHT EXPENSES				
BIG WHY TOTAL \$				
	BIG WHY TOTAL \$			

SURVIVE \$	+ BI	G WHY	J		=	THRIVE
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TOTAL NET AMOUNT NEEDED TO **THRIVE**

YOUR LIFESTYLE FUNDING

In	2025	I must	make \$		

Let's do the following math problem to figure out you can reach that amount.

Let's say the average commission is 2.5% and your average price for a home is \$500,000. Your commission will be \$12,500. Take away what you owe you brokerage and you are left with a lesser number, let's say it's \$10,000.

Your Goal + Average Comission = How many homes you need to sell

Example: $$100,000(Goal) \div $10,000(Commission) = 10 Transactions$



What is the most important number to achieve this goal? _____



Want to go further? Scan this code to get our THRIVE calculator template





			А	CTION TIME _	INCOM	E TIME	MISC. TIME
	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
8:00 AM							
9:00 AM							
10:00 AM							
11:00 AM							
12:00 PM							
1:00 PM							
2:00 PM							
3:00 PM							
4:00 PM							
5:00 PM							
6:00 PM							
7:00 PM							
8:00 PM							
WEEKLY TOTAL							
A	Α	Α	Α	Α	A	A	A
 	М	М	М	М	M	М	М
KEY PRO	SPECTS	PRE-C	LIENTS	CLI	ENTS	UNDER CO	ONTRACT

APPOINTMENTS MADE _____

APPOINTMENTS KEPT____

OFFERS WRITTEN ____

NEW UNDER CONTRACTS ____

Want to go further?

Scan this code to get our

AIM for Success Tracker



DAILY SPRINT -

MY NON-NEGOTIABLES

ACTIVITY	TALLY TRACKING
NEW CONVERSATIONS (1 PT EACH)	12345678910
FOLLOW UP CALL (1 PT EACH)	1 2 3 4 5 6 7 8
FOLLOW UP TEXT (1 PT EACH)	1 2 3 4 5
HAND WRITTEN NOTE (1 PT EACH)	1 2 3 4 5
VIDEOS (1 PT EACH)	1 2 3 4 5
POST ON SOCIAL (YES = 5PTS)	YES NO
REVIEW / REFERRAL REQUEST (YES = 10PTS)	YES NO

PERSONAL DEVELOPMENT

ACTIVITY	TALLY TRACKING
GROWTH: 10 MINUTES (YES = 10 PTS)	YES NO
30 MIN OF SELF CARE (YES = 5 PTS)	YES NO
REVIEW + PREP FOR TOMORROW (YES = 2PTS)	YES NO

JOURNAL Objections, what worked, or what didn't work. (5 POINTS)

BONUS POINTS

ACTIVITY	TALLY TRACKING		
INITIAL CONSULTATION SET (10 PTS)	1 2 3		
INITIAL CONSULTATION HELD (10 PTS)	1 2 3		
NEW LISTING GOES LIVE (10 PTS)	1 2 3		
UNDER CONTRACT (10 PTS)	1 2 3		

DAILY POINTS	/70
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BONUS POINTS

GRAND TOTAL







