

2025 BUSINESS PLANNING

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 moments over the last year?

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Which 3 moments are you the most proud of overall?

If you could sum up 2024 in one word: _____

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

“Success is a series of small victories.”- Jaime Tardy



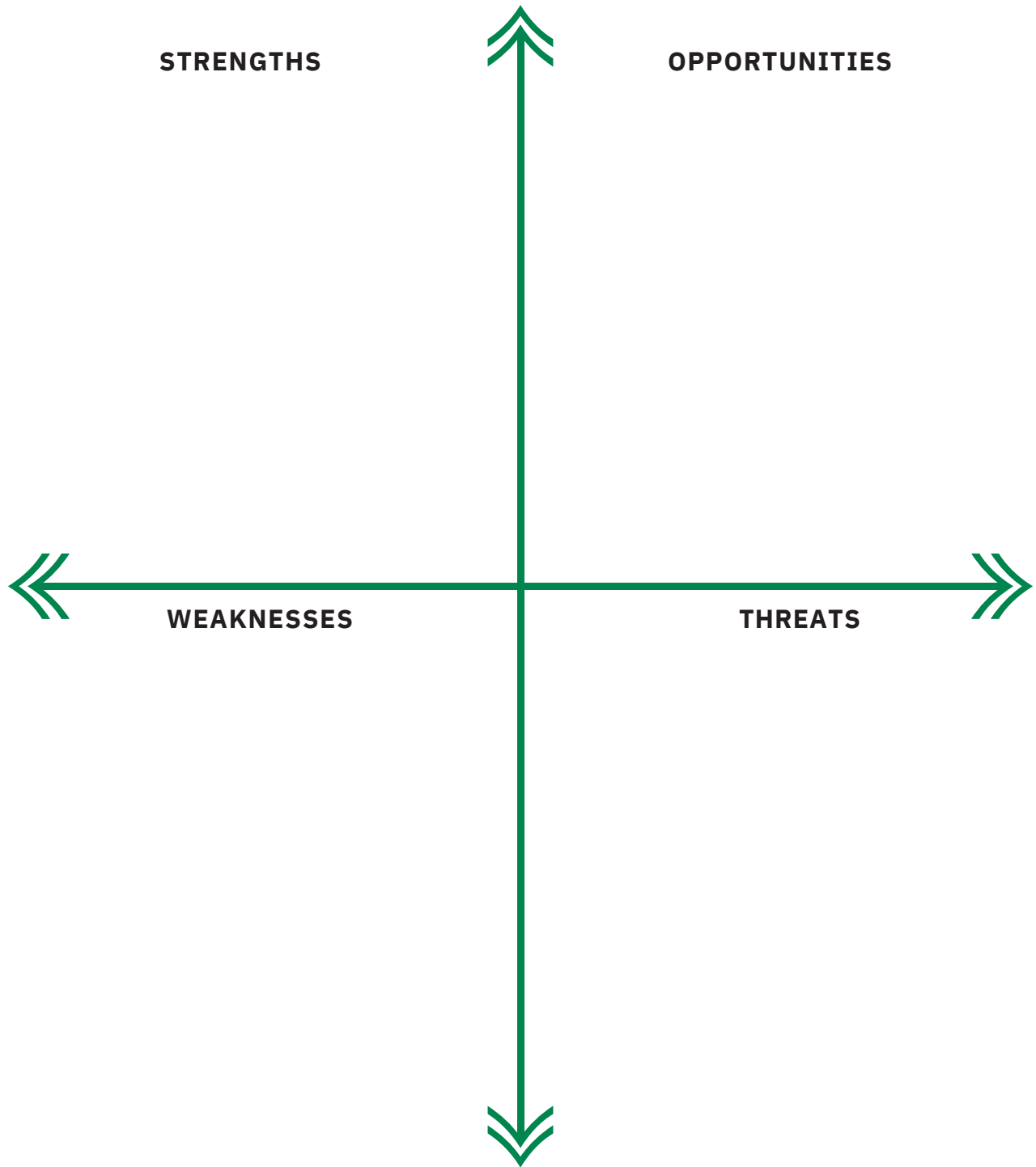
S.W.O.T. ANALYSIS

Understanding your strengths, weaknesses, opportunities, and threats.

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



S.W.O.T. ANALYSIS

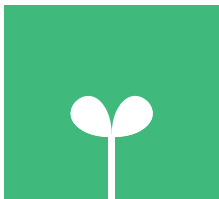
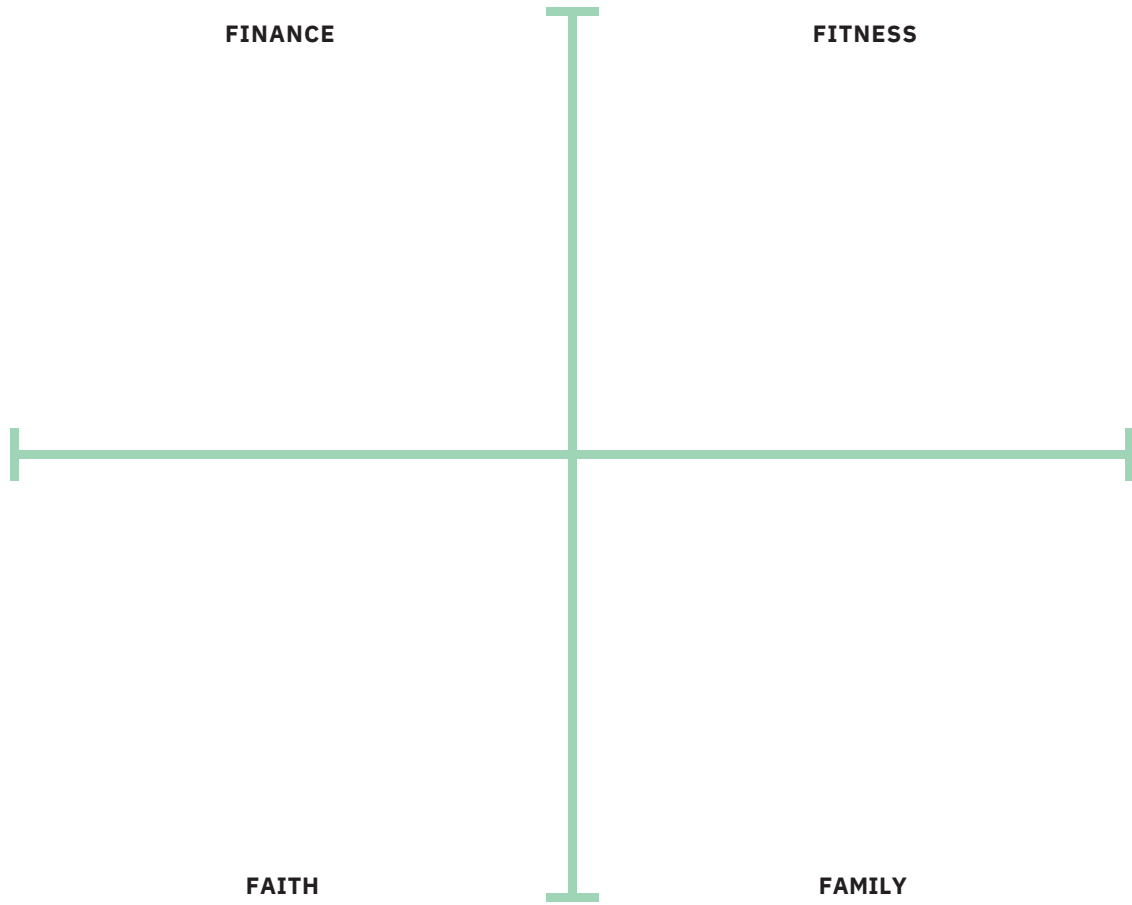


STRATEGIC PLAN

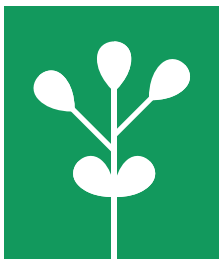
To reach our goals and run our business effectively, we have to make a plan and follow it. Here are some steps toward a Strategic Plan for your business:

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



START UP



SURVIVAL



STABILITY



SUCCESS



SIGNIFICANCE

YOUR VALUES ASSESSMENT

Choose 16 values that best align with you.

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

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

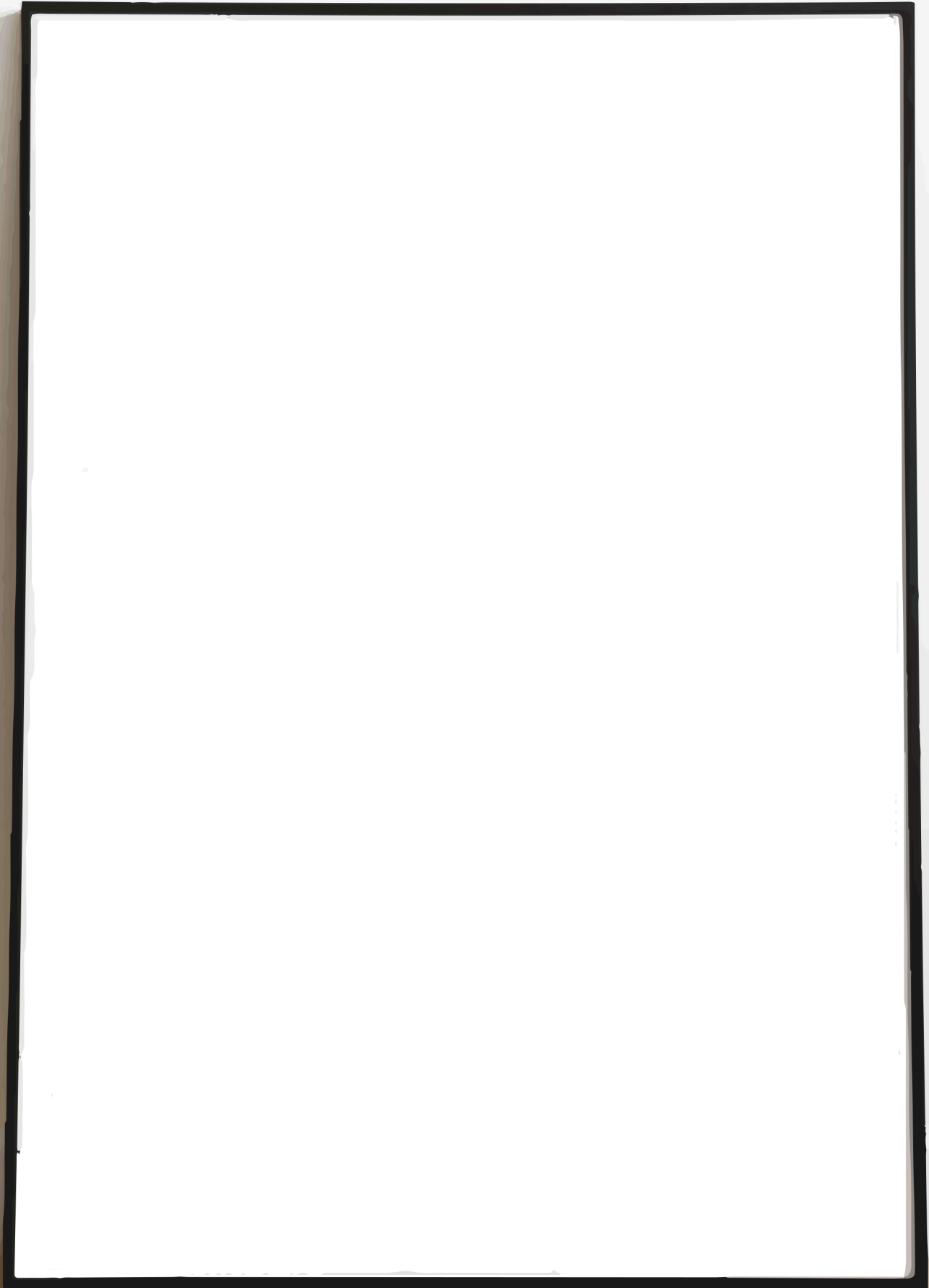
BUSINESS

FAMILY/RELATIONSHIPS

HEALTH/RECREATION

YOUR

BLANK CANVAS



YOUR EXPENSES TO THRIVE

BIG WHY EXPENSES

<i>Retirement</i>	
<i>Vacation</i>	
<i>College Fund</i>	
<i>New Car</i>	
<i>Pay Off Debt</i>	
<i>Savings</i>	
BIG WHY TOTAL \$	

SURVIVE \$ _____ **+ BIG WHY \$** _____ **= THRIVE**

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) ÷ \$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



AIM TARGET TRACKER

ACTION TIME → INCOME 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	A _____	A _____	A _____	A _____	A _____	A _____	A _____
I	I _____	I _____	I _____	I _____	I _____	I _____	I _____
M	M _____	M _____	M _____	M _____	M _____	M _____	M _____
TOTALS							

KEY PROSPECTS	PRE-CLIENTS	CLIENTS	UNDER CONTRACT

IN DATABASE _____
 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

Today's Date:

ACTIVITY	TALLY TRACKING
NEW CONVERSATIONS (1 PT EACH)	1 2 3 4 5 6 7 8 9 10
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 <input type="checkbox"/> NO <input type="checkbox"/>
REVIEW / REFERRAL REQUEST (YES = 10PTS)	YES <input type="checkbox"/> NO <input type="checkbox"/>

PERSONAL DEVELOPMENT

ACTIVITY	TALLY TRACKING
GROWTH: 10 MINUTES (YES = 10 PTS)	YES <input type="checkbox"/> NO <input type="checkbox"/>
30 MIN OF SELF CARE (YES = 5 PTS)	YES <input type="checkbox"/> NO <input type="checkbox"/>
REVIEW + PREP FOR TOMORROW (YES = 2PTS)	YES <input type="checkbox"/> NO <input type="checkbox"/>

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

+

BONUS POINTS

=

GRAND TOTAL

