



2022

# BUSINESS PLANNING WORKBOOK

Realtor Edition



# PLAN FOR YOURSELF IN 2022

It's a new year, and a new opportunity to plan for success. Success in life, both personally and professionally should be intentionally planned. We believe the more intentional we are with what we want to accomplish, the higher likelihood of achieving our goals. This book will provide you the template for developing your plan.

For you as real estate agents, we believe it's vital to plan and set the course for your individual production and personal goals. To that end, we encourage you to focus on these three key areas:

- ◆ Sourcing Business – strategies behind what builds/ sustains your business
- ◆ Customer Experience – your plan for giving your clients the very best possible experience
- ◆ Personal Growth – caring for all aspects of your life

## Goals:

A goal is the desired result that you seek to achieve because of implementing strategies and intentions. A goal:

- ◆ Defines the destination
- ◆ Changes the direction or mindset to move towards a new destination
- ◆ Creates the necessity to develop specific tactics

## Strategies:

Often confused with goals, strategies are the building blocks/stepping stones to achieving a goal. Strategy, which is derived from ancient Greek for "generalship," is the method or plan that is executed to bring about a desired future, the goal. Strategies are the specific projects or tactics to get from where you are to where you want to go.

In the planning process, we recommend you work 90-day strategies. There is no limit to the number of strategies, but recommend no more than 3 every 90 days. Keeping in mind that 3 every 90 days is a total of 12 strategies for the year. Consider your bandwidth and resources before the plan is finalized.

## Action Items:

Stated simply, this would be the step-by-step actions or activities that must take place for a strategy to be implemented. A list of action items should be identified and then organized in the order they should be executed.

**All the best to you and have a terrific 2022!**



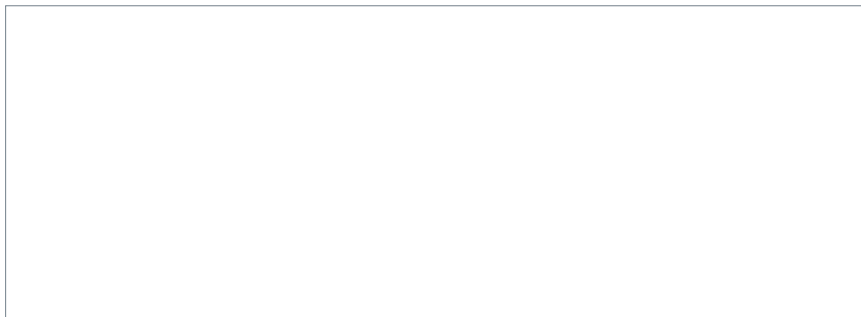
LET'S GET  
STARTED

BOOST YOUR AWARENESS

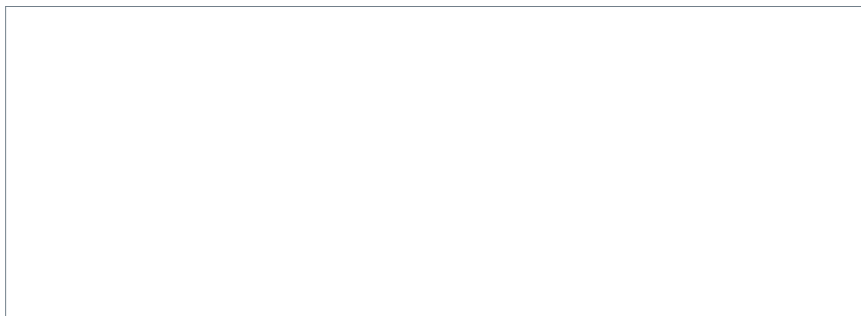
# 2021 SELF EVALUATION.....

Answer the following questions honestly as you evaluate your successes & challenges in 2021.

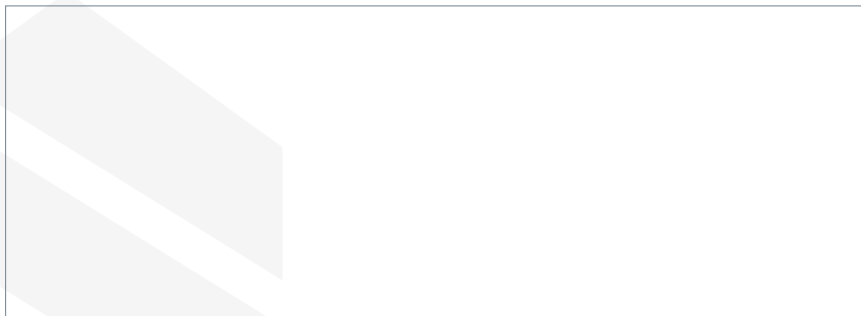
*1. What were your successes and what are you most proud of from the year?*



*2. What were some of your biggest challenges? Did you overcome or are they still a challenge?*



*3. What did you hope to accomplish but did not this past year, and why?*



# SELF EVALUATION CONT.....

On a scale of 1 to 10, how would you rate yourself in the following areas for 2021:

Business Development	My actions towards sourcing new business	
	My relationship with my business partners	
Time Management	My daily/weekly intentions towards my business plan	
	My schedule and time-blocking for high priority activities	
Marketing	My actions towards retaining my customer base	
	My implementation of new marketing strategies to attract and engage my audience	
Technology & Process	My ability to generate more business and/ or more time by creating efficiencies through technology	
	My improvement of the customer experience by leveraging technology and/or a new process	
Personal Growth	My prioritization and time to recharge myself and care for my wellness	
	My success in achieving one personal goal that wasn't related to work	




# PRODUCTION KEY METRICS

Identify the actual for 2021 and set the numbers necessary for 2022

	2021 ACTUAL	2022 GOALS
# of Closed Listings		
# of Closed Buyers		
# of Listings Taken		
Listing Close Ratio (Taken / Closed)		
# of Buyers / Clients		
Buyer Close Ratio (Taken / Closed)		
Average Sales Price		
Average Listing Days on Market		
Average Client Closing Cycle		

# PROFESSIONAL & PERSONAL PLANNING FOR 2022



Looking at the future and making a business plan takes commitment and focus. Be honest with your intentions.

*1. List 3-5 of Your Personal Values*

*2. Define Your Value Proposition & How You are Different.*

*3. What Are Your Key Priorities (List them & time-block for commitment)?*

*4. What does success look like for me?*

*5. What will be my daily/weekly habits to achieve my personal and professional plan?*



# BUILDING BETTER HABITS: CHANGE YOUR HABITS. CHANGE YOUR LIFE.

## The 4 Laws for Building / Breaking Habits



BUILDING GOOD HABITS	BREAKING BAD HABITS
1. Make it obvious 2. Make it attractive 3. Make it easy 4. Make it satisfying	1. Make it invisible 2. Make it unattractive 3. Make it hard 4. Make it unsatisfying

***“A habit is a behavior that has been repeated enough times to become automatic” – James Clear***

1. What is My New Habit?

2. Why Do I Want to Start this Habit?

3. Who Will Hold Me Accountable?

***“We are what we repeatedly do. Excellence then, is not an act, but a habit.” – Will Durant***



# RAISE YOUR GAME

## MAKE YOUR PLAN

SOURCING BUSINESS · PEOPLE & EXPERIENCE ·  
PERSONAL GROWTH

1. Determine goals for the 2022 year. Set 1-3 strategies for each goal every 90 days
2. Identify the action items necessary to implement your strategies
3. Evaluate your progress every 90 days, make adjustments, and plan your next 90 days

# SOURCING BUSINESS.....

90-Day Time Frame: \_\_\_\_\_

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

# SOURCING BUSINESS

90-Day Time Frame: \_\_\_\_\_

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

# SOURCING BUSINESS

90-Day Time Frame: \_\_\_\_\_

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90-Day Time Frame: \_\_\_\_\_

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:



# CUSTOMER EXPERIENCE.....

90-Day Time Frame: \_\_\_\_\_

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

# CUSTOMER EXPERIENCE

90-Day Time Frame: \_\_\_\_\_

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

# CUSTOMER EXPERIENCE.....

90-Day Time Frame: \_\_\_\_\_

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:



# PERSONAL **GROWTH** **PLANNING**

**NURTURE YOUR SELF.**

# PERSONAL GROWTH

90-Day Time Frame: \_\_\_\_\_  
Enter Dates

## 1. HEALTH & WELLNESS

GOAL: \_\_\_\_\_  
Strategy: \_\_\_\_\_  
Action: \_\_\_\_\_

## 2. INTELLECTUAL & LEARNING

GOAL: \_\_\_\_\_  
Strategy: \_\_\_\_\_  
Action: \_\_\_\_\_

## 3. FINANCIAL SECURITY

GOAL: \_\_\_\_\_  
Strategy: \_\_\_\_\_  
Action: \_\_\_\_\_

## 4. RELATIONSHIPS & WORKLIFE BALANCE

GOAL: \_\_\_\_\_  
Strategy: \_\_\_\_\_  
Action: \_\_\_\_\_

# PERSONAL GROWTH

90-Day Time Frame: \_\_\_\_\_  
Enter Dates

## 1. HEALTH & WELLNESS

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Action: \_\_\_\_\_

# NOTES



# NOTES



# NOTES





CREATING  
**EXPERIENCES**  
THAT **MATTER**

# THE POWER OF APM

