BUSINESS PLAN TEMPLATE

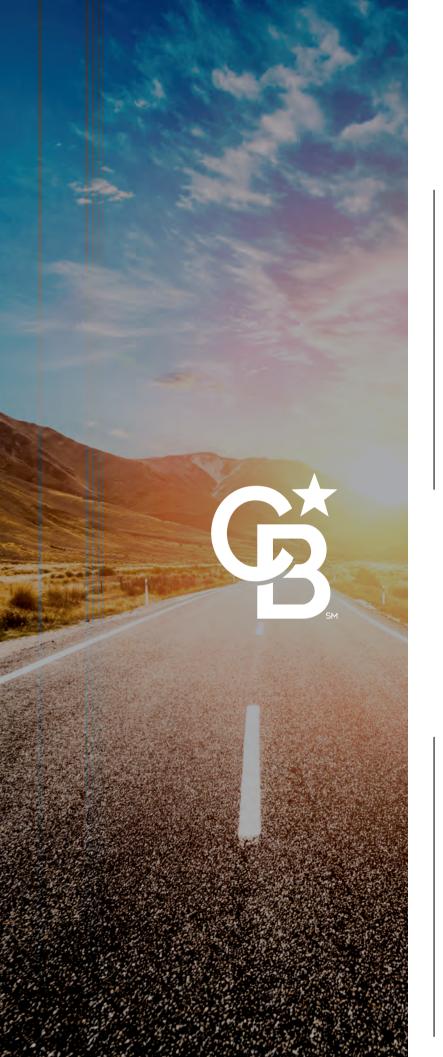
BOOTCAMP





A goal without a plan is just a wish.

-ANTOINE DE SAINT-EXUPERY FRENCH AUTHOR



MY DRIVE

My **DRIVE** is the reason, purpose, belief and driving force behind what I do. It is what keeps me from quitting during a bad day. It is **MY** purpose.

VALUE PROPOSITION

This is what differentiates and **SETS ME APART** from my competitors. It **TELLS THE STORY** of what I do, what I offer, and how I do it.



WORD of the year

TOP FIVE goals for 2021





MY FINANCIAL GOAL

TOTAL Number of **TRANSACTIONS** Needed This **YEAR**

TOTAL Number of **CONTACTS** Needed Each **WEEK**

TOTAL Number of **APPOINTMENTS** Needed Each **WEEK**



WHAT I TELL MYSELF I fill my mind with POSITIVE & EMPOWERING THOUGHTS.

Today is great because I choose to make it great! Referrals come to me easily and often. I am financially independent. I am kind, generous and thoughtful. I expect to win and I do. I live my dreams. l empower everyone around me. I achieve my goals. Opportunities always present themselves to me. I surround myself with positive, successful people. I am disciplined, therefore I achieve my goals. I am accountable, therefore my business grows. Money & abundance flow freely to me. Sellers trust me to price their homes right. I add people daily to my sphere of influence. I visualize setting appointments and I set them. I sense the proper time to ask closing questions. I always ask for referrals. I set appointments with ease. Because I prospect... I set appointments. I am brave and courageous. I am a leader. I am organized and disciplined. I have integrity. I am enthusiastic. People are attracted to my positive energy.

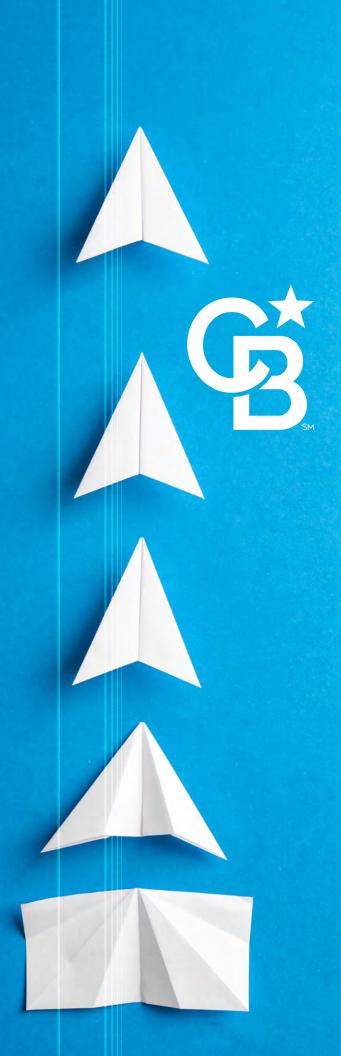


#1 PRIORITIES

OTHER PRIORITIES

DAILY TIME-BLOCKED SCHEDULE





TRACKING SUCCESS

O1 Contacts Appointments Buyer Agreements Listings Closed Transactions

03

Contacts Appointments Buyer Agreements Listings Closed Transactions

05 Contacts Appointments Buyer Agreements Listings Closed Transactions

O7 Contacts Appointments Buyer Agreements Listings Closed Transactions

O9 Contacts Appointments Buyer Agreements Listings Closed Transactions

11 Contacts Appointments Buyer Agreements Listings Closed Transactions

O2 Contacts Appointments

- Appointments Buyer Agreements Listings Closed Transactions
- O4 Contacts
- Appointments Buyer Agreements Listings Closed Transactions
- 06 Contacts Appointments Buyer Agreements Listings Closed Transactions

08 Contacts Appointments Buyer Agreements Listings Closed Transactions

10 Contacts Appointments Buyer Agreements Listings Closed Transactions

12 Contacts Appointments Buyer Agreements Listings Closed Transactions



MISSION STATEMENT

This is my **HOW**.

VISION STATEMENT

This is my **WHY**.



Marketing **GOALS**

BUDGET

TARGET Audience

MY MARKETING CALENDAR

DAYS 1 - 30 Content - Subject Matter & Media	Date(s)	Engagement Results
DAYS 31 - 60 Content - Subject Matter & Media	Date(s)	Engagement Results
DAYS 61 - 90 Content - Subject Matter & Media	Date(s)	Engagement Results



SOI PLAN 12 MONTH OUTREACH PLAN

Outreach Plan

01 Outreach Plan 02 Outreach Plan 03 Outreach Plan 04 Outreach Plan 05 Outreach Plan 06 Outreach Plan 07 Outreach Plan 08 Outreach Plan 09 Outreach Plan 10 Outreach Plan 11 Outreach Plan

12

OPEN HOUSE PLAN

BEFORE

Prospecting

Marketing

DURING Prospecting

Marketing

AFTER Prospecting

Marketing





EXPIREDS PLAN

Items of Value (item, priority)

SAMPLE SCRIPT

Hi, this is (your name). I'm a real estate agent affiliated with (brokerage name).

Our records show that you had your home on the market (*number of months*) ago. I thought that I would reach out and see if I could give you an update on what the value of your home is now. The market has changed in the last (*number of months*) and it could be time for a fresh look—your home may have a better chance of selling now.

Could I come over at _____ or ____ when both you and any other decision makers would be home? It would take no more than thirty minutes.

My Message

Disclaimer: Comply with the National Do Not Call Registry rules and your broker's Do Not Contact list and policies. Follow Telephone Consumer Protection Act, state, and local laws on telemarketing, auto-dialers, and prerecorded messages. Review your local MLS rules and regulations regarding the proper use of listing data.

FSBO PLAN

Items of Value (item, priority)

SAMPLE SCRIPT

Hi, my name is (*your name*). I'm a real estate agent with (*brokerage name*). I noticed that you are selling your home and I'd like to schedule a time to preview it.

If they respond, "I don't want to list with an agent."

I completely understand that. If you wanted to list with an agent, you already would have, correct? However, as a specialist in the area, I like to keep up-to-date with all the homes for sale. That includes both MLS/listing system listings and privately marketed properties like yours. If you allow me to look at your home, I would be able to see if it matches any of my buyers' needs. In addition, I will be happy to provide you with a current market update on all the homes in your price range that you are currently competing with. How does that sound?

I can see you today at ____ or tomorrow at ____. Which is better for you?

My Message

Disclaimer: Comply with the National Do Not Call Registry rules and your broker's Do Not Contact list and policies. Follow Telephone Consumer Protection Act, state, and local laws on telemarketing, auto-dialers, and prerecorded messages. Review your local MLS rules and regulations regarding the proper use of listing data.

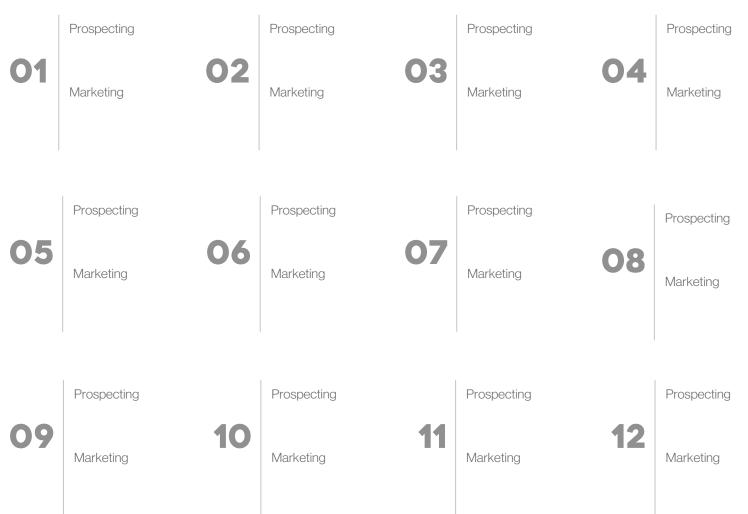




MARKETING STRATEGY

PROSPECTING STRATEGY

12 MONTH PLAN





SOCIAL MEDIA PLAN

Overall Goal - Reach, Content, Impression

Marketing Strategy

S

Μ

Т

W

Т

F

S

Prospecting Strategy

Daily Content Theme



111			
11	1		
	1	-	

Company materials, programs or meetings that are not for compliance purposes are optional for your use as an independent agent affiliated with the Company. Your use is not required for your continued affiliation with the Company. ©2020 Coldwell Banker. All Rights Reserved. Coldwell Banker and the Coldwell Banker logos are trademarks of Coldwell Banker Real Estate LLC. The Coldwell Banker® System is comprised of company owned offices which are owned by a subsidiary of Realogy Brokerage Group LLC and franchised offices which are independently owned and operated. The Coldwell Banker System fully supports the principles of the Fair Housing Act and the Equal Opportunity Act. 202LHH_NAT_B/20