

**BOOTCAMP**



**BUSINESS PLAN  
TEMPLATE**





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*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.

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## 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.

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# MY GOALS

**WORD** of the year

**TOP FIVE** goals for 2021

01

02

03

04

05







## 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.

I 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.







# THE BEST DAY

## #1 PRIORITIES

Vertical line for #1 priorities

## OTHER PRIORITIES

Vertical line for other priorities

## DAILY TIME-BLOCKED SCHEDULE

8AM

9AM

10AM

11AM

12PM

1PM

2PM

3PM

4PM

5PM

## MORNING PRIORITIES

Vertical line for morning priorities

## AFTERNOON PRIORITIES

Vertical line for afternoon priorities



# TRACKING SUCCESS

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**01**

Contacts  
Appointments  
Buyer Agreements  
Listings  
Closed Transactions

**02**

Contacts  
Appointments  
Buyer Agreements  
Listings  
Closed Transactions

**03**

Contacts  
Appointments  
Buyer Agreements  
Listings  
Closed Transactions

**04**

Contacts  
Appointments  
Buyer Agreements  
Listings  
Closed Transactions

**05**

Contacts  
Appointments  
Buyer Agreements  
Listings  
Closed Transactions

**06**

Contacts  
Appointments  
Buyer Agreements  
Listings  
Closed Transactions

**07**

Contacts  
Appointments  
Buyer Agreements  
Listings  
Closed Transactions

**08**

Contacts  
Appointments  
Buyer Agreements  
Listings  
Closed Transactions

**09**

Contacts  
Appointments  
Buyer Agreements  
Listings  
Closed Transactions

**10**

Contacts  
Appointments  
Buyer Agreements  
Listings  
Closed Transactions

**11**

Contacts  
Appointments  
Buyer Agreements  
Listings  
Closed Transactions

**12**

Contacts  
Appointments  
Buyer Agreements  
Listings  
Closed Transactions





# MISSION STATEMENT

This is my HOW.

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# VISION STATEMENT

This is my WHY.

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# 90 DAY MARKETING PLAN

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

- 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 | Outreach Plan



# OPEN HOUSE PLAN

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## BEFORE

Prospecting

Marketing

## DURING

Prospecting

Marketing

## AFTER

Prospecting

Marketing



OPEN  
HOUSE

# 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



# 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





# FARMING PLAN

## MARKETING STRATEGY

## PROSPECTING STRATEGY

### 12 MONTH PLAN

**01**

Prospecting

Marketing

**02**

Prospecting

Marketing

**03**

Prospecting

Marketing

**04**

Prospecting

Marketing

**05**

Prospecting

Marketing

**06**

Prospecting

Marketing

**07**

Prospecting

Marketing

**08**

Prospecting

Marketing

**09**

Prospecting

Marketing

**10**

Prospecting

Marketing

**11**

Prospecting

Marketing

**12**

Prospecting

Marketing



# SOCIAL MEDIA PLAN

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Overall Goal - Reach, Content, Impression

Marketing Strategy

Prospecting Strategy

Daily Content Theme

S

M

T

W

T

F

S







**COLDWELL  
BANKER**

