

Business Plan



Business Planning 2023

Our Schedule

Set Up Your Business For Success in 2023 with CPA Kristin Wigle

Join us for a business and tax planning session with CPA Kristin Wigle. We will cover rules and regulations, business entities and year-end tax planning.

Wednesday, September 28 @9am

Build Your 2023 Marketing Plan with Sarah Daily

First we'll note your 2022 financials and accomplishments to date. We'll then look to your 2023 goals and focus on the marketing tactics that will get you there.

Wednesday, November 30 @9am

Business Plan Wrap Up with Cory Bettesworth

Let's wrap up your business plan with a bow before the new year! We'll help fill in any holes and come up with a plan to help you stay on track and accountable in 2023.

Wednesday, November 30 @9am

Finalize Your 2023 Budget & Sign Up For Accountability!

Now let's get your 2023 budget finalized. Then you'll submit a final copy of your business and marketing plan. We will return it to you in a bound format. We'll also keep a copy for your quarterly meeting and accountability check-ins.

Wednesday, December 28 @9am

NEW in 2023! Quarterly Accountability Check-Ins and Coaching.

Because the work doesn't end when the plan is complete.
We will help you stay on track with quarterly accountability sessions.



Accomplishments 2022

By writing down your wins you can become more aware of your progress. A better experience of your progress may increase your: motivation; perception; sense of accomplishment; and feelings of happiness. So let's record those accomplishments, no matter how big or small.

BUSINESS



FINANCIAL



PERSONAL



FAMILY



Four Life Goals

Start the new year with clear goals for your life outside of business. For each, include a brief description, rationale and intended impact. It helps to keep it concise yet concrete!

1 *Financial*

2 *Physical*

3 *Mental*

4 *Family*

*"You can't have everything you want, but you can have the things that really matter to you."
—Marissa Mayer, former president and CEO of Yahoo*

2023

Business Goals

What are the concrete goals you'd like to achieve in your business?

1

2

3

2023

Mission Statement

A Mission Statement is your brand in a sentence (or in a few). It serves as the backbone for the rest of your business plan, and is the north star that keeps you aligned with your vision.

Business Name

Mission Statement

Core Values

My Why



Market Overview

What market trends do we see having an influence on your market segments and in what way?

Trends

Possible Consequences

What is happening in the market right now that could effect your ideal customer's buying or selling experience?

s.w.o.t analysis

My Strengths:

Opportunities:

My Weaknesses:

Threats:

Your Marketing Calendar

2023 At A Glance



2023

Marketing Plan

		JANUARY	FEBRUARY	MARCH
1 s t Q u a r t e r	Reason to Call/Text/Email			
	Pop-By Gift Idea			
	Networking Event			
	Client Party Date/Time			
	Email Marketing			
	Social Media Theme			
	Digital Ad Campaign			
	Print Advertising			
	Postcard or Mailer			
	PR Opportunities			
	Additional Marketing			

		APRIL	MAY	JUNE
2 n d Q u a r t e r	Reason to Call/Text/Email			
	Pop-By Gift Idea			
	Networking Event			
	Client Party Date/Time			
	Email Marketing			
	Social Media Theme			
	Digital Ad Campaign			
	Print Advertising			
	Postcard or Mailer			
	PR Opportunities			
	Additional Marketing			

The Best System for Building Your Business

1 MOTIVATION

- Set a time to get fired up about your business!
- Attend networking events and workshops.
- Create and maintain a positive mindset with motivational books and podcasts.

2 SKILL BUILDING

- Include at least one to two hours of professional development per week.
- Invest time in the training programs your brokerage provides.
- Take advantage of educational opportunities and CE credits offered through title companies.

3 RELATIONAL MARKETING

- Implement a marketing strategy that focuses on relationships.
- Make calls, write notes and deliver small gifts of appreciation to your clients.
- Send out monthly marketing that adds value to your database.

4 TRACKING TOOLS

- Use your booj CRM to organize your database based on relationships.
- Track all calls, notes and visits to your clients.
- Review your progress regularly.

5 ACCOUNTABILITY

- Get a real estate coach or mentor to keep you on track.
- Make them your trusted advisor.
- Listen to what they have to say and implement it!

The secret to your growth: **REFERRALS!**

Referrals are the secret sauce for building your business.

Build COMMUNITY and CONNECTION. Relationships are at the core of your success!

Providing value to your community and staying in touch with previous clients can only help you in the end. Not only that, it's a rewarding and fulfilling way to conduct business and focus on what matters most, the people you are serving.

#1 Ask for referrals at the happiest moments.
(after an offer is accepted)

#2 Maintain client communication using a CRM.
(booj is an excellent option for RE/MAX agents)

#3 Stay top-of-mind with key market insights.
(your clients' real estate journey does not end at the closing table)

#4 Build community and connection online.
(share consistently and bring value)



In a 2020 survey conducted by *The Close*,

83% of agents
got a new client
through referral.

2022 RECAP

Complete each line for a bird's eye view of 2022.



"You can't really know where you are going until you know where you have been."

-Maya Angelou

1) Gross Commission Income (GCI)

2) Business Expenses

3) Profit (subtract 1 from 2)

4) Closed Transactions

5) Listing Appointments

6) Listings Taken

7) Listings Sold

8) Buyer Appointments

9) Buyers Worked With

10) Buyer Sales

11) Average Sales Price

12) Average Commission per Transaction

13) Average Hours Worked per Week

14) Hours Spent Prospecting per Week



2023 Financial Assessment

	Business		Personal	
Total Monthly Budget				
	\$	# of Months	\$	# of Months
Total Cash Reserves				
Additional Assets				
Liabilities				
Net Worth				
Retirement				

“Success is not final; failure is not fatal: it is the courage to continue that counts.” – Winston Churchill

Let's go.



Today is a new opportunity.

I will greet this day with love in my heart.

I will take positive action toward my goals.

I will ask for help when I need it.

I will live in the moment.

I will act now.

I will persist until I succeed.