



Step 1 : Set Your BusinessGoals for the Year

BUSINESS GOALS			
Total number of transactions:		Total sales volume:	
Average sales price:		Gross Commission Income:	
Total # of buyers:		Costs:	
Total # of sellers:		Total Income:	

Additional Notes from Your Business Planning:



Step 2 : Analyze Your Past Performance

Learning from Your Past Marketing	
Where did the majority of your buyers come from? (the source)	
Where did the majority of your sellers come from? (the source)	
What was your most effective form of marketing?	
Why was it so effective?	
Where did you see the greatest return in your marketing?	
Will you implement your most effective marketing again?	
What didn't work or was the least effective?	
Why didn't it work?	
Will you try it again (after making changes to improve the plan)?	
Where do you see the greatest potential in your marketing?	



Step 3: Choose Your Target Customer & Farm Areas

Example:

Customer: Millennial Homebuyer	
Brief description of this ideal person	Millennials are tech forward and service orientated. They tend to go online for answers and enjoy living in areas that match their lifestyle. Ages are mid-twenties to late thirties and are often working professionals or younger families.
What is their main goal?	To own a home - even more specific - in some of the most desired neighborhoods for millennials of X,Y, and Z
What's standing in the way of them achieving that goal?	Unsure about the homebuying process and financing options. Lack of knowledge and experience.
What are their common objections?	They're unsure if they can buy a home and aren't sure they can buy one in an area or with features they want.
What do they value?	Value service and being able to rely on the knowledge of their agent. Value living in communities with the culture they are looking for.
Where are you most likely to find them?	Online: Social media - Instagram Offline: Tend to like these (insert areas) to live
What can you provide them?	Knowledge of the real estate process, service, tips for first time homebuyers, inside knowledge on the communities and lifestyles.



Step 3: Choose Your Target Customer & Farm Areas

Customer: _____	
Brief description of this ideal person	
What is their main goal?	
What's standing in the way of them achieving that goal?	
What are their common objections?	
What do they value?	
Where are you most likely to find them?	
What can you provide them?	



Step 3: Choose Your Target Market & Farm Areas

Neighborhood: _____	
Neighborhood or Area:	
# of Homes in the Area:	
Turnover Rate %: <small>(For Example, if there are 500 homes in a neighborhood and 25 sell during the last 12 months, the turnover rate is 5%)</small>	
Average Price:	
Average Equity:	
Popular Online? <small>https://www.trends.google.com</small>	
Is the Farming Area Saturated with Content Online?	
Is there Potential for You to Focus on This Neighborhood Online?	
On Social Media, are there Dedicated Facebook Pages or Instagram Profiles that Focus on this area? Is there an Opportunity for you?	



Step 4: Set Your Marketing Budget (Time & Money)

My Projected Budget	
How much time will you spend every week on your marketing?	Hours:
How much time will you spend daily?	Hours:
What percentage of future income from closing do you want to use for your marketing budget?	
Based on your projected sales performance, how much money will you spend monthly on your marketing efforts?	
Do you have money outside of your closings you want to contribute? If so, how much?	
What's your budget for attracting new business?	
What's your budget for sphere based marketing?	
Total Monthly Budget:	
Total Yearly Budget:	



Step 6: Sphere of Influence Touch Plan

Monthly Touch Point	
January	
February	
March	
April	
May	
June	
July	
August	
September	
October	
November	
December	

Additional Touch Points	
When/Frequency	



Step 9: Put It On Your Calendar

Ideas

- Use a physical calendar or day planner to keep track of your plan.
- Buy an oversized wall calendar and update monthly.
- Make a new Google Calendar (or online calendar of choice) for your marketing plan.
- Use project management tool like Adana or Monday.
- Create an excel spreadsheet with due dates.

I plan to use: _____

Step 10: Keep Perfecting Your Plan

As the year goes on you will find out what is working and what is not working and make changes to your marketing plan.

Daily:

Look at your plan daily for the items you need to be executing on.

Monthly:

Review your plan's performance that month

Quarterly:

Re-evaluate and make any changes as needed

Here's to an awesome year in Real Estate!

