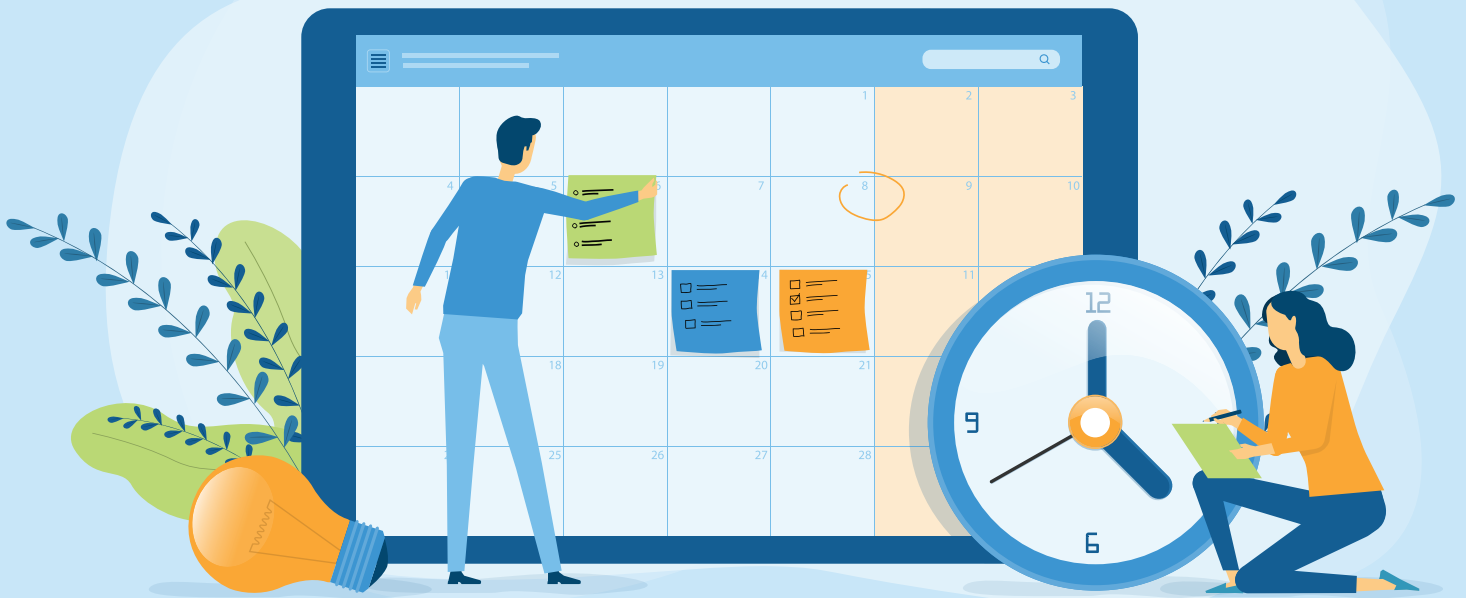


2024

BUSINESS PLANNING WORKBOOK



This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

BUDGET EVALUATION

Utilize the budget evaluation tab of the business planning spreadsheet to determine the following:

Are there ways you can reduce your expenses?

What new expenses do you anticipate?

GOAL EVALUATION

Enter your results from the goal evaluation tab of the business planning spreadsheet.

Income Needed:

Seller Side Closed Transactions:

Target Sales Volume:

Buyer Side Closed Transactions:

Target Transactions:

Target Listing Appointments:

Target Buyer Side Clients:

One of these items will become your ONE GOAL!

It's up to you if you want your goal to be revenue-driven or transaction driven.

Write THE ONE GOAL here:

MARKET EVALUATION

Your marketing efforts are the heartbeat of your business. Take the time to evaluate your marketing systems and look for the gaps ... What you're not doing (or not doing consistently) is your opportunity to grow! (Note that this exercise focuses on reaching future clients, not marketing properties.)

Past Clients & Sphere of Influence

What is your system for building a database of past clients and keeping it current?

How often do you reach out (by email, personal phone call, USPS, etc.)?

Describe your typical content or talking points:

Rate your current system on a scale of 1-10.

1 = Not working at all

1 2 3 4 5 6 7 8 9 10

Lead Generation

What consistent lead-generation activities do you currently use in your business?

What digital advertising do you have in place?

Are you farming a neighborhood?

Yes

No

Rate your current system on a scale of 1-10.

1 = Not working at all

1 2 3 4 5 6 7 8 9 10

Social Media

What is your system for including your contacts in your social media networks?

Do you have personal or professional profiles? Do you have one profile for all your content?

How do you feature your professional expertise vs. personal updates?

How often do you post? What’s your system for responding to “likes,” “comments,” etc.?

Do you have a system to monitor your engagement? In other words, do you track what kind of content gets the most response?

What are your best strategies for sourcing shareable content and developing original content? How much is about real estate (your listings, market news, tips for homeowners, etc.)?

How often are you posting video content?

Rate your current system on a scale of 1-10.
1 = Not working at all

1 2 3 4 5 6 7 8 9 10

Professional Network

What industry organizations or regular gatherings do you attend?

How often do you preview new built-homes and communities?

How many mortgage lenders do you work with to stay on top of financing options for your clients?

When was the last time you met with your title team to learn about their new resources?

Rate your current system on a scale of 1-10.
1 = Not working at all

1 2 3 4 5 6 7 8 9 10

ONE PAGE BUSINESS PLAN

The One Goal: _____

Expenses
Rating: _____
Activities

Track Your Results

Are you currently on budget? Yes No
Current Sales Volume:
Closed Transactions:
Listing Appointments:
Buyer Appointments:

Past Clients and Sphere of Influence
Rating: _____
Activities

Track Your Results

--

Lead Generation
Rating: _____
Activities

Track Your Results

--

Quarter: _____

Social Media
Rating: _____
Activities

Track Your Results

--

Professional Network
Rating: _____
Activities

Track Your Results

--

Other
Rating: _____
Activities

Track Your Results

--

Building better businesses,
one Realtor at a time ...

Independence Title EDUCATION



Independence Title

Find events, videos, and a full menu of classes at
IndependenceTitle.com/Education



Locally Grown ♦ Texas Strong

Independence
Title IndependenceTitle.com