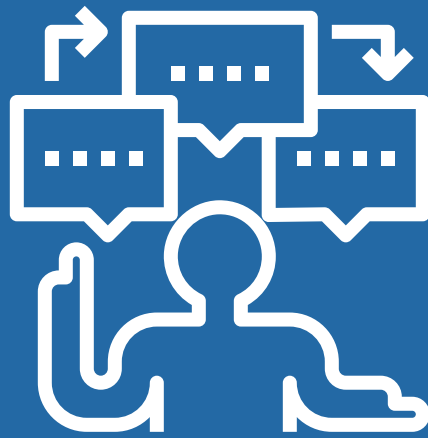


BUSINESS PLANNING STARTER PACK



matthewrathbun.com



LAST YEAR IN REVIEW

ORIGINAL GOALS FOR LAST YEAR

LISTINGS TAKEN

HOPED FOR?

SELLER SIDES

HOPED FOR?

BUYER SIDES

HOPED FOR?

RENTER SIDES

HOPED FOR?

NET PRODUCTION

LISTINGS TAKEN

SELLER SIDES

CLOSED LISTINGS.

BUYER SIDES

BUYER TRANSACTIONS.

RENTER SIDES

RENTER TRANSACTIONS.

WHAT WENT DOWN?

HOW DID YOU PROSPECT LAST YEAR?

DID YOU ACHIEVE YOUR GOALS LAST YEAR?

WHY OR WHY NOT.

BIGGEST ACCOMPLISHMENT?

BIGGEST "STRUGGLES" OF LAST YEAR?

BRAND NEW AGENT?

Don't worry about filling in this page.



TRANSACTION GOAL

HOW MANY TRANSACTIONS DO I NEED TO CLOSE THIS YEAR?

WHAT IS YOUR GROSS INCOME GOAL? (EXAMPLE: \$200,000)

A

WHAT IS THE AVERAGE SALES PRICE IN YOUR MARKET AREA? (EXAMPLE: \$200,000)

B

**WHAT IS THE AVERAGE SALES COMMISSION IN YOUR MARKET?
(I.E. IF IT'S 2%, THEN USE THE FIGURE 0.02)**

C

**NOW LET'S CALCULATE WHAT YOUR AVERAGE SALES COMMISSION IN DOLLARS:
EQUATION: C X B (EXAMPLE: 0.02 MULTIPLIED BY \$200,000 = \$4,000)**

D

**HOW MANY DEALS DO I HAVE TO DO IN ORDER TO REACH MY GROSS INCOME GOAL?
EQUATION: A / D (EXAMPLE: \$200,000 DIVIDED BY \$4,000 = 50 TOTAL TRANSACTIONS)**

= TOTAL TRANSACTIONS



Who Are You?

YOU MUST ANSWER FOUR QUESTIONS.

WHAT DO YOU DO?

HOW DO YOU DO IT?

WHO DO YOU DO IT FOR?

WHAT VALUE ARE YOU BRINGING?



MISSION STATEMENT

TAKE THIS MOMENT TO CREATE YOUR OWN MISSION STATEMENT IN 1-4 SENTENCES.

A large, empty white rectangular area intended for writing a mission statement, framed by a light gray border.



VISION STATEMENT

TAKE THIS MOMENT TO CREATE YOUR OWN VISION STATEMENT IN 1-4 SENTENCES.

A large, empty white rectangular area intended for writing a vision statement, framed by a light gray border.



CORE VALUES

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____



SWOT ANALYSIS

STRENGTHS	WEAKNESS
•	•
•	•
•	•
•	•
OPPORTUNITIES	THREATS
•	•
•	•
•	•
•	•



Smart Goals Worksheet

Setting realistic and achievable outcomes.

My goal is:

S
SPECIFIC

What do I want to happen?

M
MEASUREABLE

How will I know when I have achieved my goal?

A
ATTAINABLE

Is the goal realistic and how will I accomplish it?

R
RELEVANT

Why is my goal important to me?

T
TIMELY

What is my deadline for this goal?



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Goals & Vision

My vision - My business in the future

Milestones

SHORT TERM GOALS

Goal

Action steps

Next
month

Next
quarter

Next
semester

LONG TERM GOALS

Goal

Action steps

Next
year

Next 3
years

Next 5
years



Objective and Key Results

AGENT		DATE PREPARED	
OKRs for		TIMEFRAME START	TIMEFRAME END

OKR 1		SCORE
OBJECTIVE 1		
KEY RESULT 1		
KEY RESULT 2		
KEY RESULT 3		

OKR 2		SCORE
OBJECTIVE 2		
KEY RESULT 1		
KEY RESULT 2		
KEY RESULT 3		

OKR 3		SCORE
OBJECTIVE 3		
KEY RESULT 1		
KEY RESULT 2		
KEY RESULT 3		

OKR 4		SCORE
OBJECTIVE 1		
KEY RESULT 1		
KEY RESULT 2		
KEY RESULT 3		

OKR 5		SCORE
OBJECTIVE 2		
KEY RESULT 1		
KEY RESULT 2		
KEY RESULT 3		

OKR 3		SCORE
OBJECTIVE 3		
KEY RESULT 1		
KEY RESULT 2		
KEY RESULT 3		