

A background image showing two people in business attire (one in a grey blazer, one in a white shirt) leaning over a wooden table. They are looking at and pointing to various business documents, including a pie chart, bar graphs, and spreadsheets. There are also colorful sticky notes and paper clips on the table. The overall tone is professional and collaborative.

BUSINESS PLANNING FOR 2021

BUSINESS PLANNING GUIDE

for Realtors

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SINGLE-PAGE BUSINESS PLAN

Example for the Solo Agent

ANNUAL GOAL:

Close 45 Transactions

3 KEY FOCUS AREAS:

- 1 Establish Online Presence
- 2 Lead Generate for New Business Daily
- 3 Organize SOI in CRM Database and systematically grow & contact it

5 OBJECTIVES FOR EACH FOCUS AREA:

1

ONLINE PRESENCE

1. Set up and/or update all social media network profiles. Establish general action plan for communication on each network.
2. Create personal landing page linking all social media networks.
3. Complete 4 Agent Websites for:
 - Sellers;
 - Buyers;
 - Neighborhood Farm; and
 - Blog
4. Locate & attend 3 training courses on internet lead generation.
5. Develop blog theme, create action plan and start blog posts.

2

LEAD GENERATE

1. Lead Generate every Monday - Friday for 3 hours (9:00am to Noon). Alternate contacts to SOI, FSBOs, Expires & Just Listed/Solds.
2. Meet w/ accountability partner every Monday morning at 10:00am to hold me accountable to my goals.
3. Be faithful to my calendar! Time-block my lead generation times so I am no longer available in the mornings.
4. Role play scripts with an accountability partner regularly.
5. Obtain 3 new listings, 3 buyer contracts, and 4 closed transactions per month.

3

COI DATABASE

1. Contact all my family, friends, past clients, and lead to get updated contact information.
2. Contact 50 people per week until everyone has been contacted, and all updated info is received.
3. Enter all contacts in Database Management System. Add 10 new contacts per week to database.
4. Attend CRM trainings to help me get everyone uploaded, create & launch campaigns.
5. Systematize campaign contacts & calendar.



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SINGLE-PAGE BUSINESS PLAN

Example for the Team

ANNUAL GOAL:

\$50 Million Annual Sales Volume

3 KEY FOCUS AREAS:

- 1 Customer Service: Create the Ultimate Client Experience
- 2 Lead Generation: Track Agent Generation & Conversion Activity
- 3 Hire & Recruit: Attract New Talent to the Team

5 OBJECTIVES FOR EACH FOCUS AREA:

1

CUSTOMER SERVICE

1. Admin Assistant to conduct 30,90, and 120 day follow-up calls to clients after all closings to suggest vendors for improvements & ask for referrals.
2. Produce pre-listing video introducing the team, marketing plan, and services we provide to send to client prior to initial listing appointment.
3. Increase online presence with 4 team websites:
 - Sellers
 - Buyers
 - Neighborhood Farms
 - Blog
4. Enhance/update client database contacts:
 - 33 touches per year
 - Client appreciation event
5. Grow vendor database
 - Contact regularly
 - Vendor appreciation party
 - Create vendor list & web page
 - Refer them systematically

2

LEAD GENERATION

1. Conduct group lead generation every Mon-Fri for 2 hours (9am-11am) for all sales agents Agents meet at 8:30am for role play and scripts practice beforehand.
2. Sales agents to track lead generation activities (Contact - Appointment - Contract), and submit at end of each week for accountability and to establish conversion ratios.
3. Determine criteria & system to:
 - Distribute inbound leads/calls
 - Make outbound contacts to COI, FSBO, Expireds, Just Listed/Solds and Farms
4. Develop action plans & campaigns to farm 4 neighborhoods.
5. Each month, obtain:
 - 10 new listings;
 - 9 buyer contracts; and
 - 15 closed transactions

3

HIRE & RECRUIT

1. Begin search for an Administrative Lead Coordinator. Interview 4 applicants per month until found. Create job description and establish behavioral profile.
2. Hire an Inside Sales Agent (ISA) - determine compensation schedule, job duties and description, and behavioral profile. Locate ISA training resources or coach.
3. Establish criteria/goals for Buyers Agents to earn Showing Assistants. Establish respective job descriptions and compensation schedules.
4. Develop printed and video presentations to recruit new sales agents.
5. Locate two new sales agents in adjacent geographic locations to expand and service new areas.



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GROWTH WON'T HAPPEN BY ITSELF.

Top real estate teams and agents use a simple, one-page plan to organize everything they want to accomplish in a single year. ICC's Business Plan consolidates your goals into a streamlined, accessible document that allows everyone to follow its action steps. A tidy 1-3-5 format allows you to focus on the key activities that specifically lead to the results you desire.

1

CHOOSE YOUR 1 BIG ANNUAL GOAL

Make it specific, measurable and time-bound. Whether your goal is conceived as total sales volume, gross commission income or number of units sold, make sure it has a numeric value associated with it.

2

BE FOCUSED

Once you've identified your #1 goal, establish 3 key focus areas that need attention over the following year. These focus areas should represent some of your more daunting tasks that will require a lot of work, assistance, and input from other people. They are the big tasks that are always looming in the back of your mind that never seem to get done.

3

BREAK IT DOWN

Next, break down each focus area into 5 specific objectives that are in alignment with each focus area. Each objective should represent a specific action or task that can be completed and tangibly measured



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REACH OUT TO AN ICC COACH

ICC's Business Plan empowers you to be ambitious but pragmatic about creating transformative but humanly attainable goals. Our coaches work with you and your plan to drive activities forward and keep you focused on growth. Helping you reach your goal is our goal.

TAKE ACTION



INFO@ICENHOWERCOACHING.COM

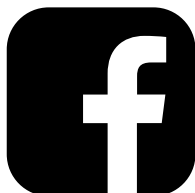


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REAL ESTATE AGENT ROUND TABLE

Stay up to date on what's happening in our industry and join our Facebook group, for free, relevant content daily, including breaking news on the real estate market.



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