

Business Planning Packet

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ANNUAL BUSINESS PLAN

SECTION 1: LAST YEAR REVIEW

- 1) Total income paid: _____
- 2) Total business expenses: _____
- 3) Total deals closed: _____
- 4) Total listing appointments: _____
- 5) Total listings taken: _____
- 6) Total listings sold: _____
- 7) Buyer sales: _____
- 8) Average sales price: _____
- 9) Average commission check: _____
- 10) Present pendings: _____
- 11) Active listings: _____
- 12) Days worked: _____
- 13) Total hours prospected: _____
- 14) Total contacts: _____

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SECTION 2: THIS YEAR GOALS

- 1) Income: _____
- 2) Closed deals: _____
- 3) Listing appointments: _____
- 4) Listings taken: _____
- 5) Listings sold: _____
- 6) Buyer sales: _____
- 7) Average hours per week I will work: _____
- 8) Total number of days I will work
this year: _____
- 9) Total hours prospecting for the year : _____
- 10) Total contacts made for the year: _____

SECTION 3: MY MAIN SOURCES OF BUSINESS

1. Source:

What I am doing to work them:

- A.
- B.
- C.

2. Source:

What I am doing to work them:

- A.
- B.
- C.

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3. Source:

What I am doing to work them:

- A.
- B.
- C.

4. Source:

What I am doing to work them:

- A.
- B.
- C.

5. Source:

What I am doing to work them:

- A.
- B.
- C.

SECTION 4: ISSUES AND PRIORITIES TO WORK ON

1. Challenge:

Action Items:

- A.
- B.
- C.

2. Challenge:

Action Items:

- A.
- B.

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C.

3. Challenge:

Action Items:

- A.
- B.
- C.

4. Challenge:

Action Items:

- A.
- B.
- C.

5. Challenge:

Action Items:

- A.
- B.
- C.

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QUARTERLY REVIEW FORM

Use this form at the end of each quarter to track your progress.

Client Name:

Transaction Goal Year:

Listing Goal for Year:

Action Items	The Quarter
YTD Listing Appointments:	
YTD Listings Taken:	
YTD Listings Sold:	
YTD Buyer Sales:	
Total units YTD:	

My biggest wins:

My biggest challenges:

Action items/projects to implement in the next quarter:

YTD hours prospected per day: _____ for a total of _____ hours.

YTD contacts:

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My Efficiency Ratios

Contacts per hour:	
Contacts per appointment:	
Contacts per listing taken:	
Contacts per listing sold:	
Contacts per closed deal:	
Total hours prospecting per listing:	
Total hours prospecting per closed deal:	
Prospecting income per hour based on deals closed:	
Ratio of listing appointments to listings taken:	
Total listings expired in this quarter:	
Total listings cancelled in this quarter:	
Total price reductions taken during this quarter:	
Total number of deals that fell apart this quarter:	
Current pendings at the end of the quarter:	
Current inventory at the end of the quarter:	
Total days worked:	

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MID YEAR REVIEW

SECTION 1: YEAR GOALS

- 11) Income: _____
- 12) Closed deals: _____
- 13) Listing appointments: _____
- 14) Listings taken: _____
- 15) Listings sold: _____
- 16) Buyer sales: _____
- 17) Average hours per week I will work: _____
- 18) Total number of days I will work
this year: _____
- 19) Total hours prospecting for the year : _____
- 20) Total contacts made for the year: _____

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SECTION 2: MY MAIN SOURCES OF BUSINESS

6. Source:

What I am doing to work them:

- A.
- B.
- C.

7. Source:

What I am doing to work them:

- A.
- B.
- C.

8. Source:

What I am doing to work them:

- A.
- B.
- C.

9. Source:

What I am doing to work them:

- A.
- B.
- C.

10. Source:

What I am doing to work them:

- A.
- B.
- C.

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SECTION 3: ISSUES AND PRIORITIES TO WORK ON

6. Challenge:

Action Items:

- A.
- B.
- C.

7. Challenge:

Action Items:

- A.
- B.
- C.

8. Challenge:

Action Items:

- A.
- B.
- C.

9. Challenge:

Action Items:

- A.
- B.
- C.

10. Challenge:

Action Items:

- A.
- B.
- C.

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Short Term Business Plan

Mini Business Plan For Dates _____ To _____

Days Worked _____

Hours prospected _____

Contacts _____

Appointments Gone On _____

Listings Taken _____

Listings Sold _____

Buyer Sales _____

Buyer Consultations _____

Price Reductions _____

Total Pendings _____

Total Active inventory _____

Total Closed Deals Within This Time Frame _____

Total Closed Income Within This Time Frame _____

Projects I need to complete within this time frame _____

The Benefits I will receive when I complete this plan: _____

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Action Plan For The Week

Name: _____ Week of _____

	Goal	Actual
1. Days worked	_____	_____
2. Hours worked	_____	_____
3. Contacts	_____	_____
4. Total listing appointments	_____	_____
5. Total listings taken	_____	_____
6. Total listings sold	_____	_____
7. Buyer sales	_____	_____
8. Total price reductions	_____	_____

Projects and Homework

- 1.
- 2.
- 3.
- 4.
- 5.

Priority Action Plan

Project Name:			
Action Item	Responsible Party	Due By	Notes

Project Name:			
Action Item	Responsible Party	Due By	Notes

Project Name:			
Action Item	Responsible Party	Due By	Notes

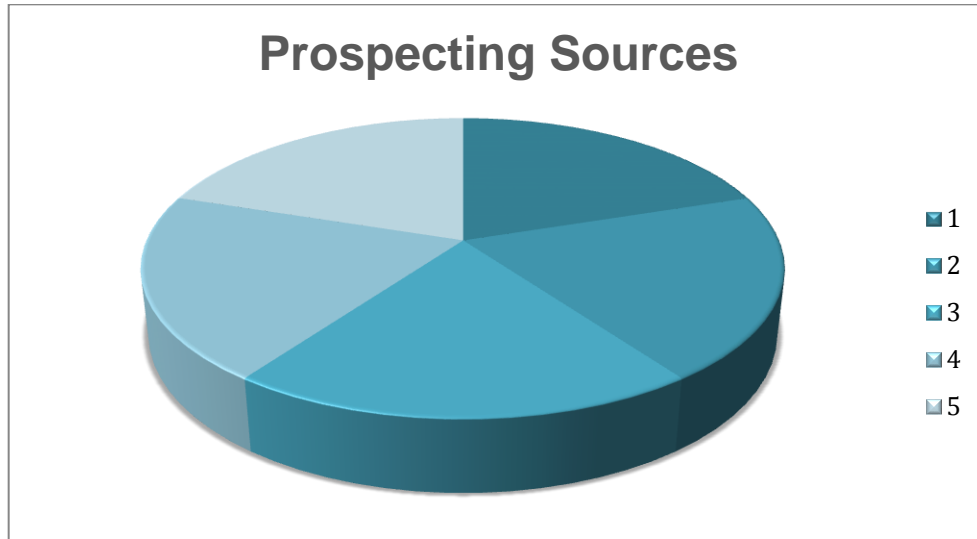
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Project Name:			
Action Item	Responsible Party	Due By	Notes

Project Name:			
Action Item	Responsible Party	Due By	Notes

Project Name:			
Action Item	Responsible Party	Due By	Notes

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Prospecting Activity:

Action Steps

- A.
- B.
- C.
- D.
- E.

Cost:

Expected Return (# of Listings/Sales):

Responsible Parties:

Major Challenge:

Solution To Challenge:

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MENU FOR SUCCESS

You are all unique and have different areas of strengths and interest. Below is a menu of action items to choose from to help you plan a super productive today. This business is hard and yet it is also simple if we have a plan. Follow the plan then we can achieve the goals that we have set. As a team if we each commit to earning 30 points a day we will have a powerful day everyday. Select daily, the items you will do from the menu. Be sure they total **30 points** by the end of the day.

Name:

Date:

Activities:

- 1) Go on a qualified listing appointments = 5 points _____
- 2) Take a saleable listing = 15 _____
- 3) Show property = 5 _____
- 4) Write an offer = 10 _____
- 5) Call and talk to 3 past clients = 2 _____
- 6) Call or see 2 expireds or FSBO's = 2 _____
- 7) Cold call 25 dials = 5 _____
- 8) Door knock 25 doors = 5 _____
- 9) Write 5 handwritten notes = 3 _____
- 10) Preview 5 properties = 3 _____
- 11) Hold open house = 5 _____
- 12) Lead Follow 30 min-1 hour = 5 _____
- 13) 2-3 sign calls/ad calls = 3 _____
- 14) Attended Networking event = 5 _____
- 15) Hand out 10 business cards = 3 _____

Total Points Earned Today: _____

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December 31st, Next Year

Let's pretend the next year has already occurred and everything went perfect!

Describe in detail as if you have already lived it all the great things that occurred for you in your business and your personal life.

The more details the better, really visualize and dream....remember "What the mind can conceive and believe it can achieve." -Napoleon Hill.

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MONEY AND PROFIT

- 1) What percent of your gross income is expense?
- 2) What would you ultimately like it to be?
- 3) How much do you personally take home each month?
- 4) Can you tell me what it costs to run your business, personal, taxes, etc...? Your total cost of living each month?
- 5) How much of a reserve account do you maintain?
- 6) How much cash on hand do you have currently>
- 7) What investments or other income do you have?
- 8) Do you have medical, life, disability insurance?
- 9) Do you have at rust?
- 10) Do you have a good CPA?
- 11) Are your taxes current?
- 12) Who pays the bills and manages the money for you?
- 13) Are they doing a good job?
- 14) How in touch with the finances are you?
- 15) How often do you review a P & L?
- 16) Will you send me a copy?
- 17) How do you go about making large purchase decisions?
- 18) Do you have a budget?
- 19) Are you paying your staff enough/too little?
- 20) What do I need to know about you financially so that I can coach you better?
- 21) What is your mindset about money?

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MONTHLY EXPENSE BREAKDOWN

PERSONAL:

House:

Cars:

Insurance:

Tuition:

Food:

Phone/utilities:

Recreation/Entertainment:

Savings:

Donations:

TOTAL OF PERSONAL EXPENSES:

BUSINESS EXPENSES:

Car:

Salaries:

General Business:

Marketing:

Education:

Other:

TOTAL BUSINESS EXPENSES:

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TOTAL COMBINED AMOUNT OF BUSINESS AND PERSONAL:

TOTAL ESTIMATED TAXES:

TOTAL NEEDED:

AVERAGE COMISSION CHECK:

MINIMUM NUMBER OF CLOSINGS NEEDED PER MONTH:

GOAL FOR NUMBER OF CLOSINGS PER MONTH:

HOW EXTRA MONEY WILL BE DISTRIBUTED:

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MONTHLY VISIT TO YOUR MONEY CHECKLIST

- 1) Review of pending pipeline.
- 2) Review of listings and potential income from their sale.
- 3) Money / cash on hand / reserves.
- 4) Review credit card purchase and big expenditures from the previous month.
- 5) Review status of investments / rentals.
- 6) What big expenses or purchases are coming up in the next month?
- 7) Taxes due in the next month.
- 8) New projects and promotions and their cost vs. results.
- 9) Review of marketing expense and results.
- 10) What money management activities do I need to do in the next month?

Example: Meet with accountant, raises rents, switch insurance brokers

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ARE YOU READY TO
EXCEL?

LET'S FIND
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This Certificate May Be Redeemed For A
Complimentary Coaching Call With one of our
Veteran Business Coaches

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