



TOM FERRY'S **BUSINESS** P L A N

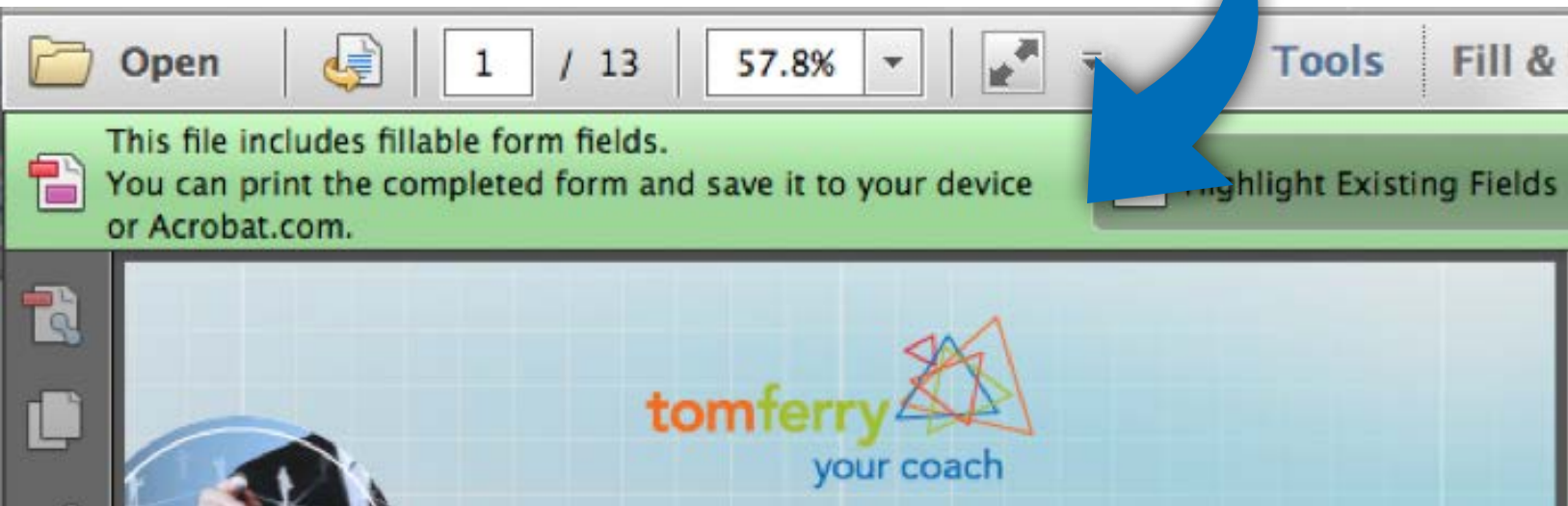
BEFORE YOU START

SAVE THIS FILE TO YOUR COMPUTER

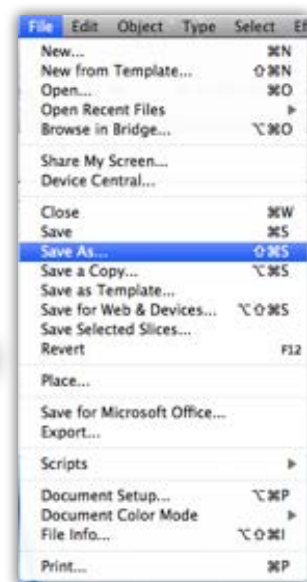


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WHEN READY, SAVE AS FILE TO YOUR COMPUTER



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VISION STATEMENT

I'M COMMITTED TO HAVE THIS YEAR BE MY BEST YEAR EVER BECAUSE...

PERSONAL VISION

PROFESSIONAL VISION

5 KEY AREAS TO **MASTER** PROFESSIONALLY

1. _____
2. _____
3. _____
4. _____
5. _____

5 KEY AREAS TO **MASTER** PERSONALLY

1. _____
2. _____
3. _____
4. _____
5. _____

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TRANSACTION RESULTS / THIS YEAR'S GOALS

SOURCE	LAST YEAR'S TRANSACTIONS		THIS YEAR'S GOAL TRANSACTIONS		
	SELLERS	BUYERS	SELLERS	BUYERS	ENHANCEMENTS NECESSARY THIS YEAR?
C.O.I./Past Clients/Repeat					
C.O.I./Past Clients/Referrals					
Referrals from Agents					
Business/Professional Network					
Geographical Farming					
JL/JS/Yikes					
Mega Open Houses					
Zillow/Realtor/Trulia/Etc.					
My Website					
Print Ads					
Sign Calls					
Expireds					
FSBOs					
Non-Owner Occupied					
NODs/Short Sales					
Relocation					
REOs					
Promotion/Seminars					
My Appointment Setter					
Other					
Other					
Other					
Other					
SUBTOTALS					
TOTALS					NOTE: TRANSFER ENHANCEMENTS NEEDED TO SYSTEMS AND MARKETING CALENDAR
	LAST YEAR		THIS YEAR		

3 NEW PROSPECTS CONVERSATION NEEDED

CONVERSATIONS CALCULATION		
ITEM	AMOUNT	DIRECTIONS
1	THIS YEAR'S TRANSACTIONS GOAL	INPUT total transactions you want
2	TOTAL NEW PROSPECT CONVERSATION NEEDED (ANNUALLY)	MULTIPLY Line 1 by 40 (conversation to sale ratio)
3	TOTAL NEW PROSPECT CONVERSATION NEEDED (MONTHLY)	DIVIDE Line 2 by 11 (months)
4	TOTAL DAILY NEW PROSPECT CONVERSATION NEEDED	DIVIDE Line 3 by 20 (monthly working days) *Minimum 5/5/4's

THE NUMBERS		
	YOU	TEAM
Income Goal for This Year		
Number of Transactions Needed for Goals		
Number of Listings Taken		
Number of Listings Sold		
Number of Buyer Sales		

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THIS YEAR'S TOP LEAD GENERATION SYSTEM

Name:	Designed to generate _____ leads
Basic System Outline:	
Team Players Involved:	Estimated Cost of System \$ _____

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Basic System Outline:	
Team Players Involved:	Estimated Cost of System \$ _____

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SYSTEM AND MONTHLY "DO" PLANS FOR GROWTH

JANUARY	FEBRUARY	MARCH
APRIL	MAY	JUNE
JULY	AUGUST	SEPTEMBER
OCTOBER	NOVEMBER	DECEMBER

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PROGRESS CHART

	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Days Worked												
Hours Prospected												
Contacts: Past Clients/COI (5)												
Contacts: New Connection (5)												
Contacts: Lead Follow Up (4)												
Buyer Leads												
Buyer Appointments Gone On												
Listing Leads												
Listing Appointments Gone On												
Listings Taken												
Price Reductions												
Listing Sold												
Buyer Sales												
Team Member Sales												
Closed & Paid Transactions												
Closed Income												
Expired/Withdrawn Listings												
Cancelled Transactions												
Open Houses Held												
Social Media Posts												
Mailers												
Newsletters Out												
Total Income												
Additional Income												
Other Successes												

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DAILY ACTION CHECKLIST

ACTIVITIES	MON	TUE	WED	THR	FRI	SAT	SUN
DATES:							
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							
13.							
14.							
15.							
16.							
17.							
18.							
19.							
20.							
21.							
22.							

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BUSINESS EXPENSES

ITEM	LAST YEAR'S EXPENSE		THIS YEAR'S EXPENSES	NOTES
	MONTHLY	ANNUALLY		
Dues (RE Board Dues/MLS Dues)				
Business Entertainment (Meals, Coffee, Cocktails, Events)				
Coaching				
Communication (Mobile Phone, Home Bus. Line, Internet)				
Education (Seminars, Books, CD's, etc.)				
Equipment & Supplies (Computers, Office Supplies, etc.)				
Accounting/CPA (Taxes)				
Marketing				
Print Advertising				
Online Advertising/Website				
Direct Mail				
Signs, Flyers, Brochures, Presentation Materials				
Promotional (Gifts, Event Tickets, Sponsorships, etc.)				
Marketing Consulting				
Other Marketing				
Other Marketing				
Misc. Sales Cost (Agent Paid Inspections, Repairs, Goodwill, Staging, etc.)				
Outside Services (Consulting, Book Keeping, etc.)				
Transaction Coordination				
Travel Expense (Airfare, Lodging, Ground Transportation, Incidentals)				
IRA Contribution				
Wages (Assistant, Employees)				
Other				
Other				
Other				
Other				
TOTAL BUSINESS EXPENSES				

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PERSONAL EXPENSES

ITEM	LAST YEAR'S EXPENSES	THIS YEAR'S EXPENSES	NOTES
Auto Gas			
Auto Insurance			
Auto Maintenance			
Auto Payments (Lease/Loan)			
Auto Purchase			
Auto Registration			
CATV/Satellite TV			
Cell Phone			
Charitable Contribution			
Childcare			
Clothing			
Club Membership			
Entertainment			
Food & Groceries			
General Household Items			
Gym, Health & Beauty			
Home & Yard Maintenance			
Homeowners Insurance			
Household Utilities			
Life Insurance			
Medical/Dental Expense			
Mortgages/Rent			
Personal Savings			
Property Taxes			
School Tuition K-12			
Vacation			
Retirement Savings			
College Funds			
Other			
Other			
Other			
Other			
Other			
TOTAL PERSONAL EXPENSES			

10 WEEKLY BUSINESS BUILDING MEETING OUTLINE

DATE: _____

1. Call to Order
 - a. Attendance
 - b. Recap Last Meeting and Results

2. Current Business Updates
 - a. Listing Transactions
 - b. Pending in Escrow/Contracts
 - c. Customer Service

3. Lead Generation
 - a. Leads
 - b. Marketing

4. Project Updates
 - a. DO
 - b. DOING
 - c. DONE

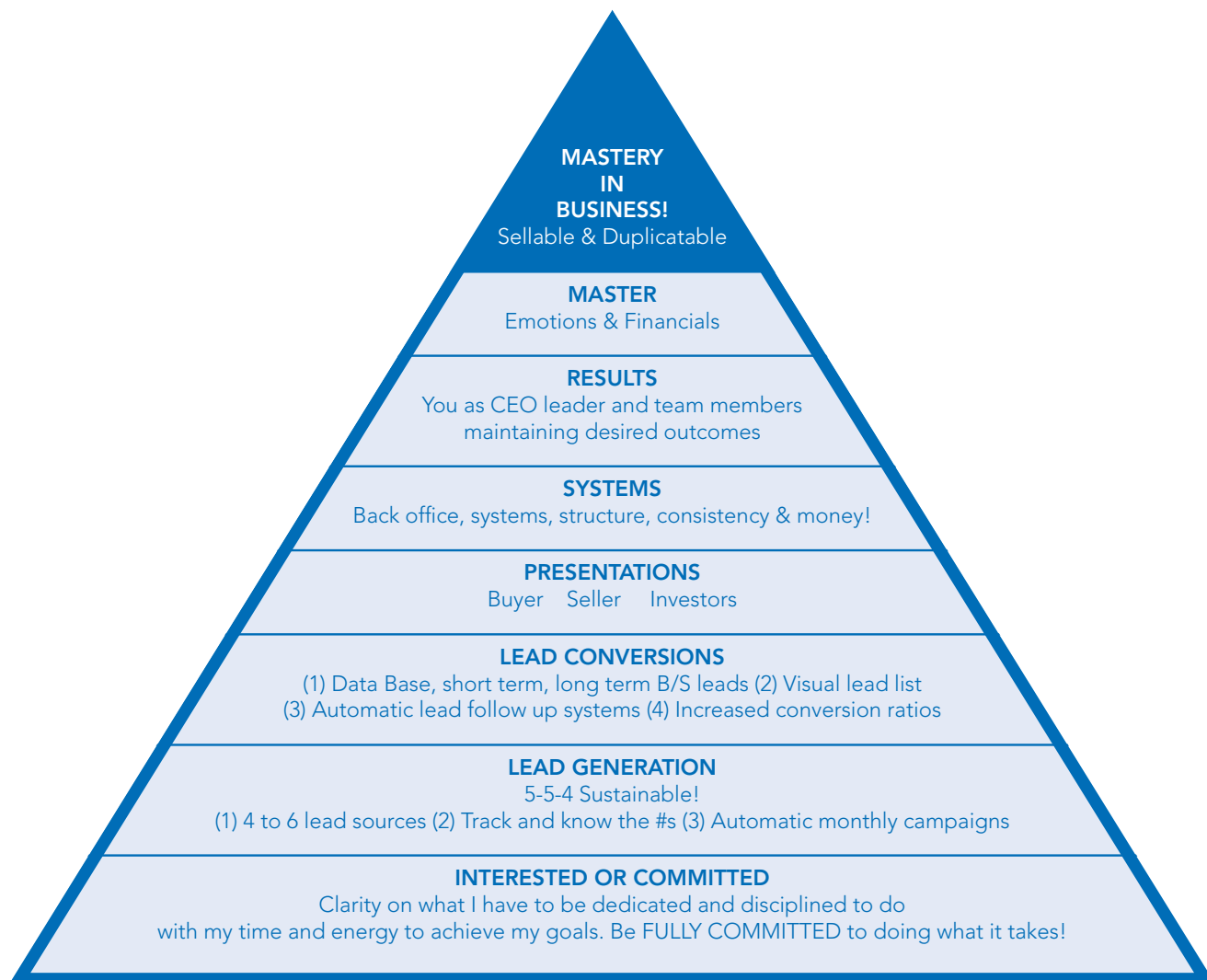
5. Administrative Updates

6. Agent/Team Updates

7. Additional Agenda Items

8. Intended Actions and Results for Next Meeting

9. Schedule of Next Meeting



REMEMBER

“Mastery happens when you are committed to the breakthrough...

The decision that enough is enough and you are no longer interested in your success, you are COMMITTED to it!!”

-Tom Ferry

"IF YOU ARE WILLING TO DO WHAT OTHERS WON'T
FOR THE NEXT FIVE TO NINE YEARS YOU CAN
DO WHATEVER YOU WANT FOR THE REST OF YOUR LIFE."
– TOM FERRY

