



TOM FERRY'S  
**BUSINESS PLAN**  
FOR MANAGEMENT

## 1 VISION STATEMENT

MY VISION FOR MYSELF

MY VISION FOR THE COMPANY

5 KEY AREAS TO **MASTER** PROFESSIONALLY

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

5 KEY AREAS TO **MASTER** PERSONALLY

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## 2 COMPANY NUMBERS

### LAST YEAR'S COMPANY PROFIT

	ITEM	AMOUNT	DIRECTIONS
1	TOTAL GCI		ENTER total GCI
2	TOTAL COMMISSIONS PAID TO AGENTS		ENTER total commissions paid to agents
3	<b>LAST YEAR'S GROSS COMPANY PROFIT</b>		SUBTRACT line 2 from line 1
4	OTHER EXPENSES		ENTER total on all other expenses
5	<b>LAST YEAR'S NET COMPANY PROFIT/(LOSS)</b>		SUBTRACT line 4 from line 3

### THIS YEAR'S AGENT RECRUITMENT GOAL

	ITEM	AMOUNT	DIRECTIONS
1	NUMBER OF AGENTS IN LAST YEAR		ENTER average number of agents
2	COMPANY PROFIT/(LOSS) LAST YEAR		ENTER company profit/(loss)
3	CONTRIBUTION PER AGENT		DIVIDE line 2 by line 1
4	DESIRED PROFIT THIS YEAR		ENTER desired profit for this year
5	<b>AGENTS REQUIRED</b>		DIVIDE line 4 by line 3

\*Modify expenses with addition of agents

### LAST YEAR'S COMPANY STATISTICS

LISTINGS TAKEN	
LISTINGS SOLD	
LISTINGS EXPIRED	
BUYER SALES	
TOTAL CLOSED TRANSACTIONS	
ESCROWS PENDING AT END OF YEAR	
OTHER	

## 3

## RECRUITING RESULTS / THIS YEAR'S RECRUITING GOALS

SOURCE	LAST YEAR	THIS YEAR	SYSTEM		
			DAILY	WEEKLY	MONTHLY
Agent Database – Contacts by Phone					
Career Seminars – Potential/New Agent					
State Licensing Schools					
Experienced Agents – Contacts					
Co-Op Agent Contacts					
New/Upcoming Office Campaign					
Visiting Open Houses					
Visiting Broker-Opens					
Congratulatory Letters					
Video Campaign					
Social Media					
Company Website					
Attending Board Functions					
Agent Email Campaign					
Office Workshops					
Print Ads					
Vulnerable Office Recruiting					
Growth Leaders Committee					
Agent Referrals					
Your Website/Blog					
Facebook Congratulatory Campaign					
Vendor Business Alliances					
Twitter					
Online Advertising					
Office Social Gatherings					
Other					
Other					
<b>TOTALS</b>					

## 4

## COACHING

THIS YEAR'S COACHING PLAN	
Total number of agents	
How many are you currently coaching	
How many need to be added this year	
<b>TOTAL THIS YEAR</b>	

AGENTS																									
NAMES	SESSIONS																								
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	
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25.																									

## 5

## RETENTION

TOTAL NUMBER  
OF AGENTS IN DATABASE

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LAST YEAR'S  
RETENTION RESULTS

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THIS YEAR'S RETENTION GOALS

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HOW MANY TOUCHES  
ANNUALLY?

MAIL	
EMAIL	
CALL	
TEXT	
IN PERSON	
SOCIAL MEDIA	
PUBLIC RECOGNITION	
OTHER	
OTHER	
<b>TOTAL</b>	

### THIS YEAR

#### EXAMPLES

DAILY      WEEKLY      MONTHLY

		DAILY	WEEKLY	MONTHLY
MAIL/EMAIL	Congratulations on a new listing, closing, sale			
PUBLIC RECOGNITION	Post results centrally in the office			
PUBLIC	Mention achievements in company meetings and training sessions			
IN PERSON	Go to their desk, invite for lunch or coffee alone or in a group			
TEXT	Congratulate on lead generation efforts			
CALL/LEAVE VOICE MAIL	Detailed conversation or voice mail on their accomplishments			
SOCIAL MEDIA	Recognize listing, sale, closing good customer service on their own Facebook page			
OTHER				
OTHER				

## 6

## TRAINING

THIS YEAR'S TRAINING GOALS			
TOPIC	DAILY	WEEKLY	MONTHLY
Lead Generation			
Market Statistics			
Script Practice			
Listing Presentation			
Objection Handling			
Buyer Presentation			
Lead Follow-Up			
Mental Toughness			
Profitability			
Past Clients Systems			
Level 10 Service			
Managing Your Numbers			
Pre-Qualification			
Managing Your Time			
Vision - Your "Why?"			
Level 10 Living			
Social Media			
Open Houses			
Setting Appointments			
Expired Listings			
Distressed Properties			
For Sale By Owners			
Price Reductions			
Building a Team			
Other			
Other			

TRAINING EVENT			
ACTION	DAILY	WEEKLY	MONTHLY
Script practice at office meeting			
Upbeat sales meeting			
Tom Ferry training			
Advanced sales training (for experienced agents)			
"Brown Bag" luncheon training			
YouTube video training			
Tele-conferences			
Off-site meetings			
Other			
Other			

## 7

## ONE YEAR DO PLAN

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



## 8

## DAILY ACTIVITY CHECKLIST

ACTIVITIES	MON	TUE	WED	THR	FRI	SAT	SUN
DATES:							
1.							
2.							
3.							
4.							
5.							
6.							
7.							
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21.							
22.							

## 9

## BUSINESS EXPENSES

ITEM	LAST YEAR'S EXPENSE		THIS YEAR'S EXPENSES	NOTES
	MONTHLY	ANNUALLY		
Accounting/CPA				
Business Entertainment				
Coaching				
Commissions Paid				
Dues & Subscriptions (Board Dues/MLS Broker Fees)				
Education (Seminars, Books, CDs, etc.)				
Equipment & Supplies				
Escrow/Loan Fees				
Insurances: E&O, General Liability				
IRA Contribution				
Lease Expenses				
Misc. Sales Cost (Inspections, Appraisals, Client Services, etc.)				
Office Salaries				
Online Advertising/Website				
Outside Meetings/Social Events				
Outside Services (Consulting, CPA, Bookkeeping)				
Phones, Internet, Answering Service				
Printing: Presentation Materials				
Printing: Stationery, Cards				
Promotional (Gifts, Event Tickets, Sponsorships, etc.)				
Recruitment Expenses				
Referral Fees				
Repairs				
Software				
Travel Expense				
Vehicle				
<b>TOTAL BUSINESS EXPENSES</b>				

## 10 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			
<b>TOTAL PERSONAL EXPENSES</b>			

**“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**

