

"Let our advance worrying become advance thinking and planning."
Winston Churchill

Business Planning Workbook for 2012



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How to Guarantee the Success of Your Plan

The success of your 2012 plan depends upon the Mindset and Attitude that you bring to the planning process.

Strength of your Mindset and Attitude translate into the Confidence and Commitment that you will have toward your plan now and all year long.

The way to guarantee the success of your plan, strengthen your mindset and attitude, your confidence and commitment is to begin each planning session with this simple and powerful routine.

Put your body in a strong physiology

Stand proudly. Shoulders back. Chest out

Smile... Really big smile even if you don't feel like it.

Take three very deep breaths. Breathe in a full slow count to ten.

Exhale the same way, slowly, count to ten.

Fill your lungs with oxygen.

Think of what you do with your body when you are really happy; when your child or your team makes the goal. Do you pump your fist, clap your hands? Call that your move. After you have filled your lungs with oxygen, put yourself into that strong physiology. Smile. And make your move.

As you make your move and say YES!

If you can say it loud, whisper it loud.

Do it again. And again. And again. One last time.

Good... your body and mind are stronger now. Your mental and emotional muscles are pumped up and eager to get to work.

Get started immediately

The Three Elements of Success

Often, planning, training and coaching only teach one or two of the following elements. To be successful all three must be addressed and cultivated. This four phase plan engages and incorporates all three to ensure your success.

Sales Skills & Habits: How you conduct your business; how you set goals and plans; how you prospect; present; how you organize and manage your time; how you serve Clients and all the how-to aspects of your business.

Attitude Skills & Habits: Why you sell Real Estate or why you find aspects of your business difficult or easy. Why you stay focused or find it hard to stay focused. Why you are driven deeply every day or distracted easily. Strength in psychology and attitude gives you the drive to survive, persist, to keep you going and get you through when the going gets tough.

Business Skills & Habits: How much have you sold so far this month compared to the same month in previous years? How much have you sold so far year to date compared to this time of year in previous years? How are you doing in relation to your goals this month and so far this year? This knowledge of your measured results is the only thing that gives you true control and confidence.

The Four Phases of Effective Business Planning

1. Lifetime — Dreams and Vision

At the end of 2011, what do you want your business and your life to look like?

2. Annual —Goals and Plans

What are the accomplishments that need to occur to make those dreams and vision a reality?

3. Monthly and Weekly —Measureable Goals and Benchmarks

What are the specific numbers and dates throughout the year that will lead to those accomplishments?

4. Immediate — Action Plans and Daily Habits

What do you need to do each day? What consistent behavior and habits are needed to achieve the business and life you desire by the end of 2012?

Dream Priorities

1. **Finances:** (Income, Savings, Investments, Net Worth)
2. **Physical** (Body, Health, Exercise, Food, Sleep)
3. **Mental** (Controlling Thoughts and Focus)
4. **Emotional** (Controlling Meaning and Feelings)
5. **Career, Work,** (Job, Position)
6. **Time and Activity Management**
7. **Organization**
8. **Family** (Quality of Relationships and Communication)
9. **Relationships**
10. **Social** (Friends, Organizations, Causes)
11. **Material**
12. **Spiritual**
13. **Contribution**
14. **Celebration**
15. **Personal** (interests, hobbies etc)
16. **What else?**

Write 3 to 5 Priorities for 2011 from above and briefly write you want from each.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

Additional Thoughts _____

Your Dream List

If it all came together... even better...

What would be your most cherished and desired outcomes for 2012?

On New Year's Eve, 2012, looking back at the year, what would make it the absolutely best year possible for you?

Look at these questions and your answers.

Carry them with you. Put them in a visible place at the end of the day. Take them with you throughout the day. Think about them. Digest them.

Every achievement begins with a thought.

What you think about for yourself and what you choose for yourself you become for yourself and for your loved ones.

What you think about, you bring about.

Dream Priority Chunkdown

Dream Priority _____

Choose one personal priorities. Look at what you want in that priority by end of 2012. At the end of each month, what will be a recognizable or measureable result? Make copies of this page so you can complete one for your other priorities.

January _____

February _____

March _____

April _____

May _____

June _____

July _____

August _____

September _____

October _____

November _____

December _____

Your Driving Force – Your Why

Ultimately, in the long term, whatever you consider long term, what do you want your Real Estate career to do for your life?

Why do you want that? Why is that important to you? Who else will benefit?

What do you want your Real Estate career to do for your life in 2012?

At the end of 2012 how will your life improve because of a very successful year in Real Estate? What will you have? Where will you have traveled? What will you have bought, paid off, contributed to, won, invested in, saved, etc?

Look at these questions and your answers.

Carry them with you. Put them in a visible place at the end of the day. Take them with you throughout the day. Think about them. Digest them.

Every achievement begins with a thought.

What you think about for yourself and what you choose for yourself you become for yourself and for your loved ones.

What you think about, you bring about.

Strengths

Currently, what are your three greatest strengths or skills that will contribute most to your success in 2012?

1. _____
2. _____
3. _____

How will each contribute to your success?

1. _____
2. _____
3. _____

What daily or weekly actions will you take that will guarantee or nearly guarantee that you are improving and increasing each of the strengths?

1. _____

2. _____

3. _____

At the end of 2012 if you maximize each strength what would be the best results; financially, confidence, reputation, in any and every way that occurs to you?

1. _____

2. _____

3. _____

Business Priorities

Rate each of these skills for importance and your current skill level on a scale of 1 to 5 (1-Least 5-Most).

	Importance	Current Skill Level
1. Selling and Communication Skills	_____	_____
Asking Questions	_____	_____
Listening with Sincere Attention	_____	_____
Embedded commands and priming words.....	_____	_____
Addressing Concerns (Overcoming objections)	_____	_____
Other _____	_____	_____
Other _____	_____	_____
 2. Prospecting and Lead Management Skills	 _____	 _____
Sphere of Influence and Past Client Calls.....	_____	_____
Open Houses	_____	_____
Converting Web and advertising leads	_____	_____
Vendor Referrals.....	_____	_____
Expireds and Old Expireds.....	_____	_____
For Sale by Owners	_____	_____
Conscientious Lead Follow up.....	_____	_____
Keeping Leads Organized.....	_____	_____
Other _____	_____	_____
Other _____	_____	_____
 3. Presentation and Negotiating Skills	 _____	 _____
Working with Buyers	_____	_____
Showing Fewer Homes.....	_____	_____
Negotiating with more confidence	_____	_____
Listing Presentation.....	_____	_____
Pricing and Price Reductions.....	_____	_____
Other _____	_____	_____
Other _____	_____	_____

	Importance	Current Skill Level
4. Quality Service Skills	_____	_____
Thorough Checklists or Whiteboards.....	_____	_____
Consistent Communication with pending Clients to closing	_____	_____
Consistent communication with listed Sellers.....	_____	_____
Keeping your word and your promises	_____	_____
Other _____	_____	_____
5. Technology Tools and Skills	_____	_____
Hardware – PDA’s, Laptops & Computers	_____	_____
Software – CRM, database, others.....	_____	_____
Posting Video	_____	_____
Other _____	_____	_____
6. Web Site and Web Marketing Skills	_____	_____
Maximizing your own website, design, layout, navigation, links ...	_____	_____
Web advertising	_____	_____
List Building	_____	_____
E-mail blasts and newsletters	_____	_____
Lead generating companies and buying leads.....	_____	_____
Blogging	_____	_____
Social Media and Social Media Prospecting.....	_____	_____
Other _____	_____	_____
7. Traditional Marketing and Networking Skills	_____	_____
Sphere of Influence Mailings	_____	_____
Farming.....	_____	_____
Creating and Building a Brand.....	_____	_____
Rewarding Referrals	_____	_____
Networking	_____	_____
Client Parties	_____	_____
Other _____	_____	_____

	Importance	Current Skill Level
8. Assistants and Team Skills	_____	_____
Hiring a first Assistant.....	_____	_____
Creating a Job Description and determining the skills needed	_____	_____
Hiring, Interviewing, and Determining compensation	_____	_____
Training, Delegating, Supervising, and Motivating.....	_____	_____
Adding Buyer Specialists and Selling Assistants.....	_____	_____
Retraining, Terminating and Replacing	_____	_____
Other _____	_____	_____
Other _____	_____	_____
9. Goal Setting, Results Tracking and Planning Skills	_____	_____
10. Attitude, Motivation, and Self Discipline Skills	_____	_____
11. Short Sale and Foreclosure	_____	_____
12. Other Business Priorities	_____	_____

When you are finished circle those that are high Importance (4-5) and low Current Skill Level (1- 2). Obviously, these are important to you and your skill in that area is weak.

These are your top priorities. Improving each of these areas in 2012 is most likely to raise your production, income and confidence.

Which of these priority skill weaknesses do you want to work on first? Choose the one that, once you strengthen it, you believe will make the biggest difference in your production, income and confidence.

Complete one of the following Business Priority Worksheets for that priority. Go on to complete one of the worksheets for any or all other high priority skills. It is most important to complete your one highest priority as part of your 2012 planning.

Note: The following Business Priority Worksheets are generic to prompt your thinking. Go beyond the questions on the worksheet and write any and all ideas that will help you turn that priority into a strength that you can depend on and that you are proud of.

Weakness

What is the one weakness that is most likely to stand in the way of your success?

You can strengthen a weakness but sometimes the time and effort spent is not the best strategy. Sometimes the best strategy is to strategize a way to achieve the goal by strategizing around a weakness. Therefore, you have a decision.

Do you need to **STRENGTHEN** it or **STRATEGIZE** to overcome it? (Circle One)

How will you do that?

What daily or weekly actions will you take that will guarantee or nearly guarantee that you are improving and increasing each of the strengths?

At the end of 2012 what will be a clear indication that you have successfully resolved that weakness? What are measurable results or recognizable indications that the weakness is overcome?

Additional notes _____

Annual Measurable Goals

Review your Dream Priorities and Dream List on pages 4 and 5.

Review your Driving Force on page 6.

Review your highest business priorities on 9 through 13.

Then quickly answer the following question. This is not the actual goal you will use in your 2012 planning. This is an instinctive response to what you really want and what it will take to get you there.

What amount of sales volume or income in 2012 would give you the indication, the confidence that you are well on your way to achieving what you want for your business and for your life?

What income? \$ _____

What sales volume? \$ _____

How many sales is that? _____

Two Huge Keys

- 1. Focus on results instead of activities. The two key results to focus on are initial appointments and sales by contract date. Focusing on activities burns you out, constantly leaves you feeling incomplete, and gives you very poor feedback about what is working in your business and what is not. Focusing on initial appointments and sales by contract date motivates you, leaves you feeling complete and gives you the best possible feedback about what is working in your business and what needs adjustment.**
- 2. Set goals by contract month instead of closed month. Closings occur too distant in time from the action of making the sale. Attempting to manage your business by closing date is frustrating and just doesn't work. Set you goals and manage your business by date of contract and suddenly you are more motivated and more in control.**

NOTE: Make several copies of this blank page before you begin to complete it so that you can complete one for as many priorities as you choose.

Business Priority Worksheet

Business Priority _____ (High Importance—Low Skill Level)

What do you want to accomplish in this Business Priority for 2012?

In this area, what do you want to stop doing, stop paying, or spend less time doing?

In this area what do you want to be sure to keep doing or do more consistently?

What do you want to buy, use, join, learn, practice or begin doing that you know will be a huge contributor to your success in this Business Priority?

What specific measurable result will occur because of your improvements and/or changes in this Business Priority?

What daily or weekly actions could you take that will guarantee or nearly guarantee that your efforts in this area will result in those measurable results.

Additional notes _____

Business Priority Worksheet

Business Priority _____ (High Importance—Low Skill Level)

What do you want to accomplish in this Business Priority for 2012?

In this area, what do you want to stop doing, stop paying, or spend less time doing?

In this area what do you want to be sure to keep doing or do more consistently?

What do you want to buy, use, join, learn, practice or begin doing that you know will be a huge contributor to your success in this Business Priority?

What specific measurable result will occur because of your improvements and/or changes in this Business Priority?

What daily or weekly actions could you take that will guarantee or nearly guarantee that your efforts in this area will result in those measurable results.

Additional notes _____



Goals That Motivate

Worksheet

Your history

2009: \$ _____

2010: \$ _____

2011: \$ _____

Based on
40 Weeks

	Volume	Income	Units	Total App'ts	App'ts/ week
Exceptional	\$	\$			
Tiptoe	\$	\$			
Disappointment	\$	\$			

Average sale price: \$ _____ Agent split: _____ Franchise Fee: _____ Co-Broke: _____

Buyer's Appointments to Sales 10: _____

Seller's Appointments to Sales 10: _____ : _____ : _____ 20 : _____

SALES PRICE – DOLLAR VOLUME

MONTHLY

	<u>JAN</u>	<u>FEB</u>	<u>MAR</u>	<u>APR</u>	<u>MAY</u>	<u>JUN</u>	<u>JUL</u>	<u>AUG</u>	<u>SEP</u>	<u>OCT</u>	<u>NOV</u>	<u>DEC</u>
2009												
2010												
2011												
2012												
GOAL												

YEAR-TO-DATE

	<u>JAN</u>	<u>FEB</u>	<u>MAR</u>	<u>APR</u>	<u>MAY</u>	<u>JUN</u>	<u>JUL</u>	<u>AUG</u>	<u>SEP</u>	<u>OCT</u>	<u>NOV</u>	<u>DEC</u>
2009												
2010												
2011												
2012												
GOAL												

OPEN UNITS - LISTINGS SOLD/TOTAL SALES (ANALYSIS)

Recorded by Contract Date

MONTHLY

	<u>JAN</u>	<u>FEB</u>	<u>MAR</u>	<u>APR</u>	<u>MAY</u>	<u>JUN</u>	<u>JUL</u>	<u>AUG</u>	<u>SEP</u>	<u>OCT</u>	<u>NOV</u>	<u>DEC</u>
2009	/	/	/	/	/	/	/	/	/	/	/	/
2010	/	/	/	/	/	/	/	/	/	/	/	/
2011	/	/	/	/	/	/	/	/	/	/	/	/
2012	/	/	/	/	/	/	/	/	/	/	/	/
GOAL	/	/	/	/	/	/	/	/	/	/	/	/

YEAR-TO-DATE

Annual
Total

	<u>JAN</u>	<u>FEB</u>	<u>MAR</u>	<u>APR</u>	<u>MAY</u>	<u>JUN</u>	<u>JUL</u>	<u>AUG</u>	<u>SEP</u>	<u>OCT</u>	<u>NOV</u>	<u>DEC</u>
2009	/	/	/	/	/	/	/	/	/	/	/	/
2010	/	/	/	/	/	/	/	/	/	/	/	/
2011	/	/	/	/	/	/	/	/	/	/	/	/
2012	/	/	/	/	/	/	/	/	/	/	/	/
GOAL	/	/	/	/	/	/	/	/	/	/	/	/

Lead Generation enough to hit your appointments per week

Methods, Sources, and Listing vs. Buyer Lead Sources

Attract (Largely Sellers some Buyers)

- | | |
|---|--|
| <ul style="list-style-type: none"> • Internet SEO • Farming – Geographic and Demographic • Direct Mail • Sphere of influence mailings and e-mails • Reputation – Advertising, Billboards • _____ • _____ | <ul style="list-style-type: none"> • Professional sphere of influence mailings and e-mails • Agent to Agent referrals • Broker Leads (maybe ask for them) • Relocation • Internet Lead Companies Subscriptions (can be active if you knock on the doors) • _____ |
|---|--|

Respond (Largely Buyers)

- | | |
|---|--|
| <ul style="list-style-type: none"> • Internet from Listings and IDX • IVR – 800 Number • Open House • _____ | <ul style="list-style-type: none"> • Opportunity Time • Top Agent Overflow • Ad/Sign Calls • _____ |
|---|--|

Act (Largely Sellers some Buyers)

- FSBO
- Sphere of influence calls
- Professional sphere of influence calls
- Networking
- Networking groups
- Expired Listings
- Builder
- REO
- Cold Call and Door Knocking
- _____
- _____
- _____
- _____



Sacred Six

Remember the story of Ivy Lee the consultant and Charles Schwab, the steel magnate. Ivy dramatically increased productivity by instilling the following concept in each of the managers of Schwab's company, U.S. Steel

- 1. In the evening, write down the six most important tasks that need to be done the next day and arrange them in order of importance.**
- 2. The next day, start the first task and finish it before starting anything else.**
- 3. After finishing the first task, start the second most important task. Finish it and then start the third and so on.**
- 4. After the day's work, spend five minutes making a list for the next day. Unfinished tasks can be moved to the new list.**
- 5. Do this for the next ninety days and check the results.**

What is your sacred six?

What prospecting activity, marketing, web, technology, service, learning, practicing, will ensure your achieve and exceed your goals.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Repetition gives birth to the most important things in our life.

Repetition is the mother of skill.

Repetition is the mother of self-esteem.

Repetition is the mother of self-confidence.

Repetition is the mother of results.

Repetition is the mother of completion.

Habits and Skill are the Keys to Success

A Habit is something you do the same way repeatedly with the goal of doing it consistently. So that it becomes a part of you. It defines you.

A Skill is something you do the same way repeatedly with goal of getting better at it.

Habits are developed through self-discipline

On the same day

At the same time

In the same place

And in the same way

"It's not the work that's hard, it's the self-discipline."

The Cost or the Benefit is ENORMOUS.

Lack of Self Discipline leads to frustration, self-criticism, and loss of self-esteem

Achieving Self Discipline leads to results with self-confidence, and unshakable self esteem.

Self respect is the fruit of *striving* for discipline.

Abraham J. Heschel, Theologian and Philosopher

Habits and Self Discipline create the bridge that connects your goals and plans to your accomplishment.

Choose one task that you want to turn into a habit.

Choose a simple goal and a deadline.

Plan to spend just 30 to 60 minutes one day of the week. (or every day, or every weekday)

Choose a day of the week and time.

Put it in your calendar as a repeating event.

Show up even if you have no idea what to do.

Build two sets of Real Estate career habits, business habits.

- 1. Weekly Habits**
- 2. Daily Habits**

Weekly Habits for the those things that make your success stable and consistent.

Daily Habits for those things that bring more immediate results and confidence

Weekly Habits

30 - 60 Minutes on your calendar

- **Monday ----- Make Appointments**
- **Tuesday ----- Skill Development**
- **Wednesday ----- Marketing**
- **Thursday ----- Quality Service**
- **Friday ----- Think and Strategize**

Do the basics!

Commit to your Friday Think and Strategize Session with Yourself

3 Steps

- 1. Update and Review numbers.**
- 2. Select next week's projects & priorities.**
- 3. Make weekly commitments.**

Daily Habits

Choose Yours. Do the minimum. Following are just some examples.

- 1. Call Active Lead Follow-ups**
- 2. Send 3 Personal Notes**
- 3. Call 3 Past Clients, Ref Sources or SOI**
- 4. Check for & Preview (New) Farm Listings**
- 5. Touch Every Pending & Active Listing**
- 6. Blog, Social Media and/or Craigslist**
- 7. Call 3 Expireds**

Do the basics!

Start today

You don't have to get it right. Just get it going. And keep improving it.

Remember... It is not the work that's hard. It is the self-discipline.

Self-discipline starts with you, beginning to work on this plan for just one 15 minute session, today. Then schedule 15 minutes to work on it every working weekday for four weeks.

We are what we do consistently. That means we are our habits.

As you build your habits you create the quality of your life.

There is only one road to success. This is one of the vehicles to get there.

There are four parts of the vehicle.

- 1. The Body.. that's *your Skills***
- 2. The Engine... that's *your Goals***
- 3. The Fuel... that's *your Positive Attitude***
- 4. The Driver... that's *your Good Habits***

The Map... that's *your Plan, this Plan*

So every working weekday you...

- 1. Learn, strengthen and develop your skills.**
- 2. Record and update your weekly and monthly goals.**
- 3. Work to strengthen your attitude and emotions.**
- 4. Instill good habits that make success guaranteed**

Goals can motivate or debilitate.

Goals can be an exciting and motivating guide to the destinations you desire.

Or goals can feel like the stressful pressure of a lit fuse that you wish to avoid.

Whether Goals motivate or not depends on three things.

- 1. Your personal experience with goals**
- 2. How you set your goals.**
- 3. What and when you measure progress.**

Unfortunately, most Agent Goal Setting is weak in considering all three.

Be sure to

- 1. Set smart annual Goals.**
- 2. Calculate a Weekly Appointment goal.**
- 3. Set and be aware of your Monthly Goals for your monthly sales (January).**

Then, particularly early in the year, build the habit of updating and being conscious of your goals and progress.

That is how you make your goals a constant motivating force toward the destination of your success.

“Data gives you the information you need. So that you are alert to the most important things that are happening in your business. This information enables you discover problems and opportunities you would not otherwise be aware of and then to take action that could cost you or earn you tens of thousands of dollars.

**Rich Levin, adapted from Bill Gates,
'Business at the Speed of Thought'**

A Requirement

There is one belief that you must have if you want to fuel your business and your life.

It is required. The belief is that:

You can control your thoughts, your speech, and your actions.

You believe that you control your thoughts, speech, and actions or you believe that you are controlled by them.

Your Thoughts Create Your Future and Your Life

What we think about ourselves becomes the truth for us.

Our subconscious mind accepts whatever we choose to believe.

Then it reflects our beliefs in our lives.

What is your thought about your business... your finances... your happiness?

Do you want that thought to dictate the future of your business, finances & happiness?

What is your thought about your success in 2012... your spouse, your child, your health?

Do you want that thought dictating your future?

So...Be Careful

Be careful of what you choose to believe.

You can't control a thought that pops into your head or feeling into your heart.

You, *absolutely*, can control whether and how long you hold that thought or feeling; whether you allow it to dictate your life.

You can choose to replace it with an empowering belief that dictates your life.

Don't be so fascinated by your thoughts and feelings.

Have your thoughts and feelings but don't let them have you.



Pick Your Pleasure(s)

Courageous	Loving	Wealthy	Complete	Accomplished	Happy	Playful
Passionate	Powerful	Fulfilled	Intelligent	Confident	Brave	Creative
Successful	Healthy	Eloquent	What else?			

Every day in every way I'm getting... Every day in every way I'm feeling...
Every day in every way I'm more and more...

All I need is within me now. All the ... I need is within me now.

Every Morning or when you are Dragging

On Your Feet!	Deep Breath	Proud Physiology
Empowered Thought	Smile	Walk (Move) Briskly
Empowered Thought		