

2015 Real Estate Business Plan

BUILD A BIGGER, BETTER YOU.

Understand your business

Set realistic goals

Identify your strengths

Know where to focus

Sell more homes

Free worksheets inside!

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About Market Leader

We define our success by your success. And we're pleased to report that Market Leader customers earn more than twice the median income of typical National Association of REALTORS® (NAR) members! Market Leader Professional has everything you need in one easy-to-use system. You're not just purchasing software. You're getting step-by-step training on how to grow your business. Call us at **1-800-976-2968** for a free consultation today.

A Bigger, Better 2015

The road to increasing your business in 2015 may seem a little daunting. However, with a little know-how, focused goals, and an actionable plan, a bigger, better 2015 is easily within reach.

Today's real estate professionals are faced with a variety of challenges. From a shifting housing market to a technological landscape that has altered the way consumers buy and sell homes, real estate agents are expected to know—and do—it all.

It can be challenging to balance your time between the tasks that are urgent and those that are important for the long-term sustainability of your business. The more you work “in” your business right now, the less time you have to work “on” your long-term vision. Of course, when business slows, the resources you need to build your business and your brand are harder to come by.

With these challenges at the forefront, how will you build a bigger, better business in 2015?

That's simple! It's all about you. No matter the direction of the real estate market, the fleeting whims and emotions of buyers and sellers or the pushes and pulls of competing business priorities—you need to be able to stay at the top of your game.

In the *2015 Real Estate Business Plan* presented by Trulia, we'll walk you through industry trends you need to know, discuss top tools that can help you reach your goals, and guide you through a simple and effective plan to focus on your strengths and achieve the success you desire in 2015.



Real Estate Market Forecast: What's Next for 2015

As an agent, your reputation depends on your knowledge of the market. As you start to plan for growing your 2015 business, it's important to have your finger on the pulse of the current market and know what to expect in the coming year.

So, what does 2015 have in store? Nine years after the housing bubble peaked and three years after home prices bottomed, the boom and bust still cast a long shadow. Prices are no longer significantly undervalued and investor demand is falling. Ideally, strong economic and demographic fundamentals like job growth and household formation would take up the slack. But the virtuous cycle of gains in jobs and housing is relatively weak, and that will slow the recovery in 2015. All the same, consumers are optimistic, according to a recent Trulia survey of American adults conducted November 6-10, 2014.

Here are some expected trends to keep in mind as you begin planning your 2015.

Consumers are optimistic

In a recent Trulia survey of American adults, 36% said that they felt 2015 will be better than 2014 for selling a home. That bodes well for agents, when it comes to your ability to snag sellers in your market. Still, it's important to remember that, despite this optimism, barriers remain to homeownership—like saving for a down payment, poor credit, and qualifying for a mortgage. You'll need to identify potential clients in your database who will be ready to overcome these hurdles and make a move!

Affordability will worsen.

Price gains slowed in 2014 and we'll see more of the same in 2015. What's more, with consumer optimism, more homes should come onto the market, cooling prices further. But home affordability for potential buyers may worsen, despite the price slowdown. Why? Most won't have seen a boost in their income and the strengthening economy may lead to a rise in mortgage rates. This may mean that more sellers will jump into the game, but still poses problems for buyers. As you think through your 2015 plan, identify trends in your market that will help you convince homeowners that now is the perfect time to sell and show buyers that the market can work in their favor.

Here's the good news. Even though the recovery remains unfinished, the housing market is becoming more stable and more certain for buyers and sellers. Capitalize on that for your Bigger, Better 2015!

Look Back: Your 2014 in Review

Before moving forward, it's helpful to have a clear idea of what you accomplished in the past year. Use this two part 2014 Performance Review as a baseline for the development of your 2015 plan.

Part 1: Where did your business come from in 2014?

Take stock of your 2014 closings by completing this Production Analysis Chart.



Quick Tip

Need more space? We've included another copy of this chart on page 25.

Production Analysis Chart

	Address	Sales Price	Source (See Next Page)	Buyer/ Seller	Community	Property Type
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						

Sources of Business

Your real estate closings will come from a variety of sources. As you review your performance, do you see any patterns? Do you have a significant number of closings that stem from one or two particular sources?



Sample

- | | |
|-----------------------|-------------------------------------|
| _____ Referral | _____ Event or Seminar |
| _____ Repeat Customer | _____ Networking or Community Group |
| _____ Farming | _____ Cold Call |
| _____ Open House | _____ Warm Call |
| _____ Relocation | _____ Door Knocking |
| _____ Asset Manager | _____ Social Media |
| _____ FSBO | _____ Online Review |
| _____ Expired Listing | _____ Personal Website |
| _____ Flyer/Mailer | _____ Trulia Profile Leads |
| _____ Floor Call | _____ Trulia Advertising Ads |
| | _____ Other: |

If you didn't reach your production goal last year, what prevented you from doing so?

What specific activity (or activities) had the most positive impact on your 2014 production?

If you could select only one lead generation activity from 2014 to repeat in 2015, what would it be? Why?

Part 2: 2014 Performance Review

Use the information from the Production Analysis Chart to conduct further statistical analysis of your 2014 performance.

Your Average Sales Price

# of Closed Transactions:	
Total Price of all Properties Sold:	\$
Divide # of Closed Transactions by Total Price of all Properties to obtain your average sale price per transaction*	\$

Your Average Earned Commission

Total Commission	\$
# of Listings	
# of Sales	
# of Listings + of Sales	
Divide Total Commission by # of Listings + Sales to obtain your average commission per transaction	\$

*Any agent (including new agents) for whom a performance review cannot be completed due to a lack of sufficient data should obtain the median sale price and the average number of closings for agents at their brokerage and use that information in 2015 projections.



Pick the Pattern

As you note the quantity of listings and sales, do you see any patterns? Did you work with more buyers or more sellers? How do these numbers align with your plans for 2015?

Set Your 2015 Goals

The best way to achieve your goals is to set them—to know where you are going. The mark of a successful real estate agent is the ability to set goals and create action plans in order to accomplish those goals. In the next sections of the 2015 Real Estate Business Plan, we will create a path for your increased success in 2015.

Part 1: Your Income and Transaction Goals for 2015

Fill in the blanks to set your 2015 income goals.

“If you don’t know where you are going, you might wind up someplace else.”

–Yogi Berra, Major League Baseball Catcher, Outfielder, and Manager

1.	My income goal for next year:	
2.	My average commission per transaction last year:	
3.	Number of transactions needed to reach your 2015 income goal (divide 2 by 1)	
4.	Percentage of closed sales that were listings last year:	
5.	Number of listings needed in 2015 to reach your goal (apply percentage in 4 to 3):	
6.	Number of buyer closings needed in 2015 to reach your goal (subtract listings from total transactions needed):	

Part 2: Prospect Calculator

Next, fill in the blanks to calculate the number of prospects needed to meet your income goals.

Number of closings desired in 2015:	
x 25 (prospect to sale ratio is 25-to-1)*	
= total number of prospects needed per year	

Total number of prospects needed daily	
Annual prospects needed	
Divided by 12 months	
Divided by 30 days (or number of days you work per month) = prospects needed daily	

*Prospect to sale ratio of 25-to-1 is reported by Dan Rickard in The Real Estate Rainmaker.

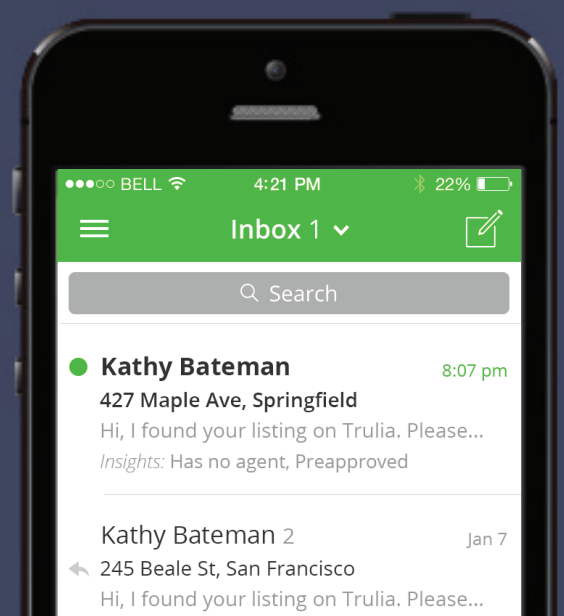


Building a Healthy Pipeline

Want to learn more? Check out our helpful lead calculator to help you determine how many leads you'll need to meet your 2015 business goals. Visit marketleader.com/leadcalculator

What is prospecting? You are prospecting when you actively obtain the leads yourself. You are marketing when you do things that make the leads come to you. It's you making contact with people as opposed to people making contact with you. A healthy pipeline of potential clients includes a solid mix of both earned and paid lead sources. What are you doing to ensure that you have a solid pipeline of potential buyers and sellers for the entire year?

Learn how Market Leader Tools from Trulia's marketing solutions can help you connect with motivated buyers and sellers in your key areas. Visit marketleader.com/leads-direct or call 1-800-976-2968 to find out more!



Identify Your Strengths

You've now identified how much you want to earn, how many transactions you'll need to close, and how many prospects you'll need to connect with each day. The next step in the process is to create a plan that will enable you to meet your income goal.

Top-producing agents know that in order to maintain long-term success, they must always strive to grow and improve. But, sometimes it's hard to look inward and identify one's own strengths and weaknesses. However, without taking this important step, you're likely to take quite a few wrong turns and missteps along the way.

In the next section, we'll help you find the fastest, most straightforward path to success by taking an honest look at your best qualities and showing you the most effective ways to work within your own skill set to achieve great success.



Learning Your Style

Research conducted by Innermetrix indicates that self-awareness is the one thing that all successful people have in common. According to Innermetrix, "Those who understand their natural behavioral preferences are far more likely to pursue the right opportunities, in the right way, at the right time, and get the results they desire." Their DISC assessment measures the four dimensions of behavioral style. To learn more about the DISC assessment or to take a complete assessment of your own behavioral style, visit www.innermetrix.com

What's Your Behavioral Style?

Identify your strengths and your behavioral preferences by answering the following questions.

1. Which term(s) best describes you: forceful, enthusiastic, patient, or cautious?

2. What words would your friends and family use to describe you?

3. What do you believe to be your most outstanding characteristics?

4. What real estate activities do you enjoy most?

5. What real estate activities do you avoid?

The Four Behavioral Styles

Now read about each of the four behavioral styles. Which one(s) best describe you?



Decisive

preference for problem solving and getting results

Words that describe you:

- direct
- forceful
- decisive
- independent
- efficient
- authoritative
- self-starter
- inquisitive



Find out More!

Struggling to select the activities that best align with your behavioral style? Check out the Marketing Activities worksheet at the back of the 2015 Market Leader Tools from Trulia Business Plan.

Notable traits:

- enjoy challenges
- self-motivated
- communicate clearly
- task-oriented
- organized

Considerations for Your Business Plan:

If you identify yourself as **Decisive**, then chances are that you will stick to your business plan. Complete the worksheets at the back of the book, and plan out all of your weekly and monthly business-building activities for the entire year right now. Note all activities on your personal calendar—on your computer, on your phone, or in your client relationship management system. Prepare and automate any systems that can be automated as soon as you can, and just stick to your system for the entire year. Outsource any mailings or other lead generation activities, if applicable. When you put those processes into practice now, you will see results.

Interactive

preference for interacting with others and showing emotion

Words that describe you:

- enthusiastic
- demonstrative
- stimulating
- inspiring
- convincing
- sociable
- influential
- charming

Notable traits:

- persuasive
- gregarious
- creative problem solver
- thrive in conversations
- fun

Considerations for Your Business Plan:

If you identify yourself as **Interactive**, you'd probably love to sit down and have coffee with prospective homebuyers. Sitting at your desk and working on your computer to manage the daily tasks associated with real estate is not the best use of your time. In addition to open houses, door-to-door sales, cold and warm calling, add lots of community events to your calendar—since networking is likely your strong suit. Hire an assistant to handle mundane tasks that you don't enjoy.

Stability

preference for pacing, persistence and steadiness

Words that describe you:

- patient
- predictable
- passive
- complacent
- stable
- consistent
- steady
- reliable

Notable traits:

- patient
- relaxed
- dependable
- loyal
- serve others

Considerations for Your Business Plan:

If your behavioral style is **Stability**, you should play to your strengths and stick to a regular daily schedule which includes regimented communication with past clients, prospective home buyers, and home sellers. For example, you may prefer to manage your online marketing and advertising at a specific time each morning, followed by allotting 30 minutes to write personal notes or send emails. Focusing on daily processes rather than outcomes will ultimately assist you in meeting your income goals.



Cautious

preference for procedures, standards and protocols

Words that describe you:

- perfectionist
- systematic
- careful
- analytical
- orderly
- neat
- precise

Notable traits:

- perfectionist
- follow procedures
- professional
- disciplined
- maintain high standards

Considerations for Your Business Plan:

If your behavioral style is **Cautious**, then you adhere very well to a schedule. Spend time incorporating the real estate activities that you enjoy into the schedule—whether those activities include Internet lead generation through blogging or videos, social media advertising, or developing Expired listing and FSBO campaigns. Your strengths lay in adhering to procedures and doing things flawlessly. Set up your system now, and use the rest of the year to quickly follow through on that system.



Develop a SMART and Realistic Plan

There are only so many hours in a day, days in a week, and weeks in a year. So, you've got to be efficient with your time—leveraging your own skill set in order to create “smart” daily, weekly, and monthly goals that lead to closed transactions.

Look back at the number of prospects you need to contact daily. Using that number and leveraging the strengths and behavior traits that you identified in the previous pages, it's time to develop a plan that will help you be even more successful in 2015 than you thought possible.

To create a thriving real estate business, there are two areas of focus: 1) lead generation, and 2) communication. Every real estate professional must devote time to those areas—no matter their own areas of strength. However, the ways in which each agent addresses lead generation and communication will be impacted greatly by the agent's personal strengths.



Expert Tip!

The method of SMART goal setting (an acronym for the 5 steps of specific, measurable, attainable, relevant, and time-based goals) is one of the most effective ways that top producers achieve success.

Whether you want to close 10 transactions or 100, learning how to set SMART goals can be the key to your success.

1: Target Markets and Lead Generation

Target Markets

In order to create a “smart” plan, you must select your target market or markets: a group or area where you will generate leads through focused communication.

Look back at your Production Analysis Chart. Were there any patterns in your 2014 closings that suggest natural target markets for 2015?

Next, review the list below, and select those markets that you will communicate with throughout the year. (Don't forget to include those that have worked for you in 2014!)

- | | |
|--|---|
| <input type="checkbox"/> Neighborhood Farm | <input type="checkbox"/> Move-up Buyers |
| <input type="checkbox"/> FSBO | <input type="checkbox"/> Home Builders |
| <input type="checkbox"/> Expired Listings | <input type="checkbox"/> Asset Managers |
| <input type="checkbox"/> Empty Nesters | <input type="checkbox"/> Referral Network |
| <input type="checkbox"/> Renter to First-Time Homebuyer | <input type="checkbox"/> Out-of-area agents |
| <input type="checkbox"/> 1031 Exchange Participants | <input type="checkbox"/> Relocation Companies |
| <input type="checkbox"/> Multi-property Investors | <input type="checkbox"/> Sphere of Influence |
| <input type="checkbox"/> Retiring Agents or Agents Getting Out of the Business | <input type="checkbox"/> Past Clients |
| <input type="checkbox"/> Properties with Mortgages in Default | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Divorce | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Probate | <input type="checkbox"/> Other: _____ |



Motivated Leads in Your Target Market!

Did you know that Leads Direct helps you connect with local consumers in your target neighborhoods? To learn more about how Market Leader Tools from Trulia can help you meet motivated buyers and sellers in your market, call 1-800-976-2968 or visit marketleader.com!

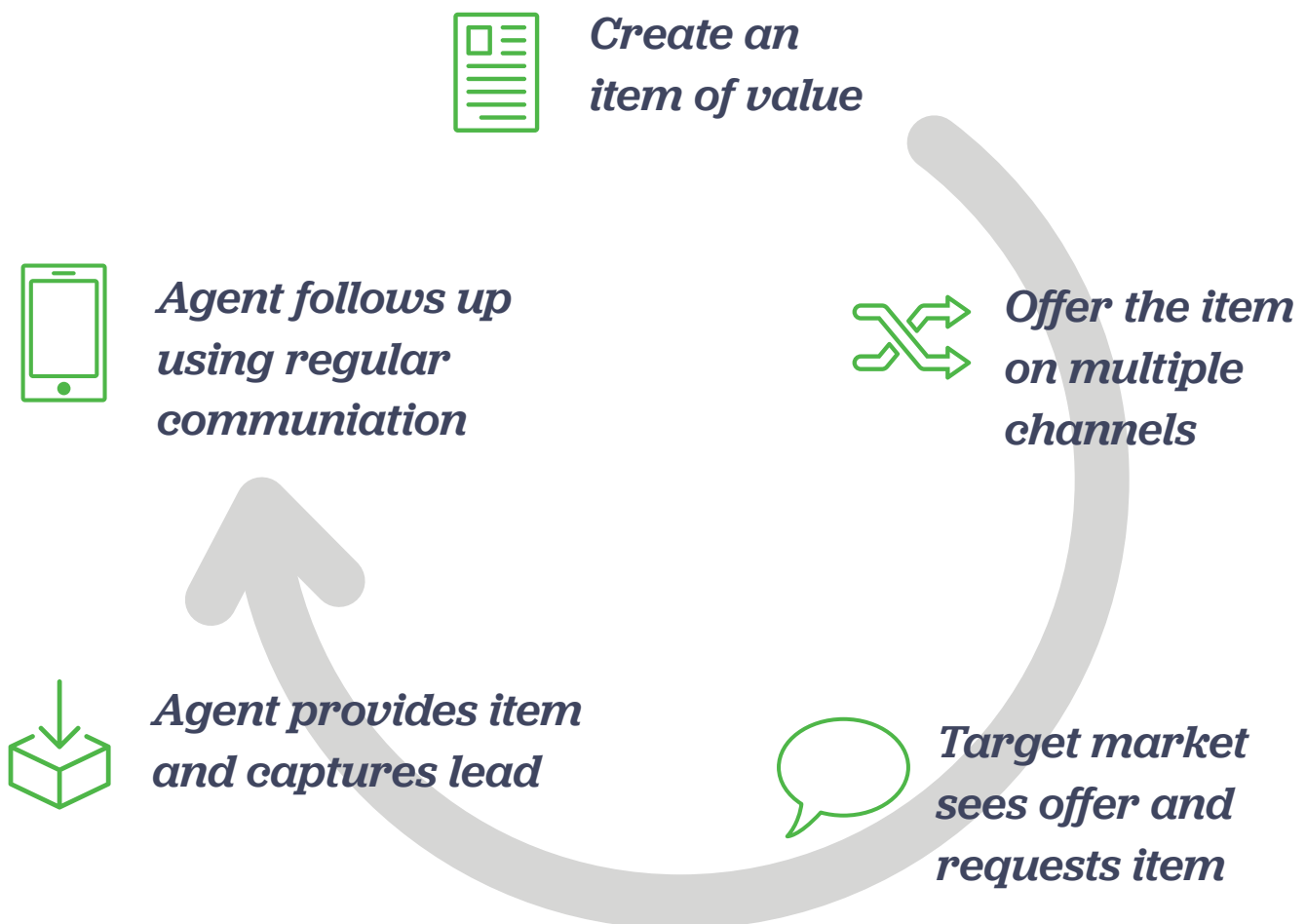


Share It!

Market Leader Tools from Trulia offers free how-to guides and must-know lead conversion plans. Find it all on learn.marketleader.com!

Lead Generation

The best way to generate leads from a target market of people that you've never met before is to offer an item of value and then follow up regularly. Items of value could include eBooks and white papers with relevant information, foreclosure lists, local market updates, or home valuations among other things.



Consider the target market(s) that you have already selected. What items of value would interest each market?

Target Market	Item of Value

2: Communication: Channels, Frequency, and Content

Communication Channels

By now, you have identified your target market(s) and considered the items that provide value to each of these markets. Once you have provided that item and captured the lead, now you need to follow up.

The four principal communication channels used by real estate professionals are email, telephone, print, and social media. Read below for more tips on how to use each channel to your advantage.



Effective Conversations!

Which communication channel best aligns with your behavioral style? Do you prefer phone calls and social connections or emails and direct mail?

Gain the competitive edge with Market Leader Professional

Are you ready to be a marketing powerhouse? Market Leader Professional can help you boost your lead generation and stand out from the crowd! Learn more at marketleader.com/professional!

Communicating by Email

Benefits:

Low Touch

Free (or almost free)

Can be automated

Doesn't intimidate people who are not quite ready to buy or sell

Segments that Respond Well to Email

New Leads: Email is great for new leads. It is low-touch, perfect so that you do not alienate someone that isn't ready to buy or sell quite yet.

Passively Searching Buyers: Email helps to build trust and also creates top-of-mind awareness. When a passively searching buyer is ready to buy, email helps you to stay top-of-mind.

Actively Searching Buyers: You can email with the segment to connect buyers with lenders and other service providers. You can also use it to set appointments and provide additional details—following up on telephone conversations.

Sphere/Past Clients: For this segment, you can send personal emails (such as holiday and birthday greetings) and you can also automate newsletters and campaigns with information of value.

Communicating by Phone

Benefits:

High Touch

Customized and Targeted Conversations

Segments that Respond Best to Phone Calls

New Leads and Passively Searching Buyers: These segments will respond well only if they have given you permission to contact them via the telephone.



Accomplish more with just one real estate solution!

Leads don't close themselves! Learn how Market Leader Tools from Trulia can help streamline your business in one simple system and help you win more clients. Manage your leads, get access to a robust marketing center and more! Get the scoop at marketleader.com/one-solution

Actively Searching Buyers: As you already have an established relationship with this segment, the telephone (and text messages) work great—especially for quick responses and appointment setting.

Sphere/Past Clients: Since you already have a relationship with this segment, they respond very well to your calls and texts. Try to have a compelling reason for each call.

Communicating by Print/Mail

Benefits:

Harder to ignore than email

Highly customizable for specific target markets

Easy to retain and review on a future date

Segments that Respond Best to Print/Mail

New Leads: Targeted print marketing is a great way to generate leads, by offering an item of value (such as a home valuation, a list of properties, or a free consultation).

Sphere/Past Clients: Since this segment already knows you, they will pay more attention to your mail than any other segment. It's a great way to keep in touch, and drive people to contact you again or visit your website.

Communicating by Social Media

Benefits:

Free (unless you generate paid ads)

Wide Reach

Segments that Respond Best to Social Media

New Leads: You can generate new leads through social media, especially if you create ads for target markets.



Win More Local Sellers!

You can attract sellers in your target market and win listings with Housevalues.com. To learn more about how Housevalues.com can help you boost your seller leads and win more listings, call 1-800-976-2968 or visit marketleader.com/housevalues.

Sphere/Past Clients: Since this segment already knows you, they will pay more attention to your posts, tweets, and messages. It's also a great way to drive this segment back to your website or into your sales funnel again.

Consider the target market(s) that you previously selected. What communication channel(s) will you use for each?

Target Market	Communication Channel(s)

Communication Frequency

Your communication frequency will vary by channel and target market. When considering the frequency of communication for each target market in your business plan, take note of the following information.

New Leads: You don't want to scare them off. Always email immediately when you meet a new lead or a new lead registers on your site. Follow up emails can be automated.

Passively Searching Buyers: You can increase the frequency a bit, because now you have a relationship with the lead. To determine the frequency, evaluate the level of interest of each searching buyer.

Note that some programs, like Trulia One, will not only provide analytics on buyer motivation, but help with nurturing those buyer leads as well.

Actively Searching Buyers: Once you have an actively searching buyer, you can respond accordingly. Since these buyers are highly-motivated, there will be naturally frequent interaction.

Sphere/Past Clients: Communicate monthly. Increase the frequency if anyone in this segment expresses interest in buying or selling.

Consider the target market(s) and communication channels that you previously noted. What communication frequency would be best for each target market?

Target Market	Communication Channel(s)	Frequency

New Leads: Send welcome emails, new listing alerts, and information about your services.

Actively Searching Buyers: Send content geared toward their requests, such as the name of a loan officer or information on schools or local areas.

Consider the target market(s), communication channels, and frequency that you previously noted. What types of content would be best for each target market?

Target Market	Communication Channel(s)	Frequency	Content

Chart Your Course to Success

Research shows that those individuals who actually take the time to create a business plan double their chances of success. The following tools will assist you as you chart your path to success in the field of real estate.

Have a look at the success tools included on the following pages:

- Production Analysis Chart
- Income Projection
- Prospect Calculator
- Plan Preparation
- Marketing Checklist
- Marketing Budget Worksheet
- Monthly Marketing Calendar
- Weekly Activity Tracker
- Daily Activity Tracker
- My 2015 Goals – Quick Reference

Production Analysis Chart

Use this Production Analysis Chart to keep track of your 2015 closings. Refer to page 5 for a handy list of possible sources for your closings.

	Address	Sales Price	Source (See Next Page)	Buyer/ Seller	Community	Property Type
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						

Income Projection

Your Income and Transaction Goals for 2015

Fill in the blanks to set your 2015 income goals.

1.	My income goal for next year:	
2.	My average commission per transaction last year:	
3.	Number of transactions needed to reach your 2015 income goal (divide 2 by 1)	
4.	Percentage of closed sales that were listings last year:	
5.	Number of listings needed in 2015 to reach your goal (apply percentage in 4 to 3):	
6.	Number of buyer closings needed in 2015 to reach your goal (subtract listings from total transactions needed):	

Prospect Calculator

Fill in the blanks to calculate the number of prospects needed to meet your income goals.

Number of closings desired in 2015:	
x 25 (prospect to sale ratio is 25-to-1)*	
= total number of prospects needed per year	
Total number of prospects needed daily	
Annual prospects needed	
Divided by 12 months	
Divided by 30 days (or number of days you work per month) = prospects needed daily	

*Prospect to sale ratio of 25-to-1 is reported by Dan Rickard in *The Real Estate Rainmaker*.

Plan Preparation

What tools and resources are you using today to build and sustain your business? Here are some commonly used tools. Put an (x) by those you are using or will use to create bigger, better business in 2015.

Use Today	Will Use	
<input type="checkbox"/>	<input type="checkbox"/>	Current database to manage client contacts and prep presentations
<input type="checkbox"/>	<input type="checkbox"/>	10 personal notes per week
<input type="checkbox"/>	<input type="checkbox"/>	Open houses
<input type="checkbox"/>	<input type="checkbox"/>	Personal brochure
<input type="checkbox"/>	<input type="checkbox"/>	Deliver client packages personally or via overnight mail
<input type="checkbox"/>	<input type="checkbox"/>	Attend at least one training each month to improve skills
<input type="checkbox"/>	<input type="checkbox"/>	Contact past clients consistently
<input type="checkbox"/>	<input type="checkbox"/>	Telemarketing campaigns
<input type="checkbox"/>	<input type="checkbox"/>	Homebuyer seminars
<input type="checkbox"/>	<input type="checkbox"/>	Direct mail to target markets
<input type="checkbox"/>	<input type="checkbox"/>	Co-marketing with affiliates and associated professionals
<input type="checkbox"/>	<input type="checkbox"/>	Magazine and newspaper ads
<input type="checkbox"/>	<input type="checkbox"/>	Mail note pads and other specialty items to farm
<input type="checkbox"/>	<input type="checkbox"/>	Financial options flyers (prepared by a lender) for listings
<input type="checkbox"/>	<input type="checkbox"/>	Quick response email and text messages
<input type="checkbox"/>	<input type="checkbox"/>	Consistent branding across all platforms
<input type="checkbox"/>	<input type="checkbox"/>	Regular website updates
<input type="checkbox"/>	<input type="checkbox"/>	Buyer pre-approval prior to showings
<input type="checkbox"/>	<input type="checkbox"/>	Contributions to online forums
<input type="checkbox"/>	<input type="checkbox"/>	Blog posts
<input type="checkbox"/>	<input type="checkbox"/>	Structured listing presentation
<input type="checkbox"/>	<input type="checkbox"/>	Video marketing
<input type="checkbox"/>	<input type="checkbox"/>	Trulia advertising
<input type="checkbox"/>	<input type="checkbox"/>	Online reviews
<input type="checkbox"/>	<input type="checkbox"/>	Pay-per-click advertising

Marketing Checklist

Check the activities that you will focus on in 2015.

Meet and Connect with People *(Interactive Lead Generation Activities)*

- | | |
|---|---|
| <input type="checkbox"/> Open houses | <input type="checkbox"/> Telephone contact with sphere |
| <input type="checkbox"/> Annual client gathering/event | <input type="checkbox"/> Consistent contact with FSBOs |
| <input type="checkbox"/> Establish/work a geographic farm | <input type="checkbox"/> Consistent contact with Expireds |
| <input type="checkbox"/> Establish/work a demographic farm | <input type="checkbox"/> Develop/work a referral group |
| <input type="checkbox"/> Establish/work a business farm | <input type="checkbox"/> Conduct buyer/seller seminars |
| <input type="checkbox"/> Expand your personal sphere of influence | <input type="checkbox"/> Pop-bys |
| <input type="checkbox"/> Regular phone calling/door knocking | <input type="checkbox"/> Engage in online conversations |

Develop Your Brand *(Task-Oriented Activities)*

- | | |
|---|--|
| <input type="checkbox"/> Email or direct mail farm | <input type="checkbox"/> Contests and giveaways |
| <input type="checkbox"/> Updating online profiles | <input type="checkbox"/> Develop a monthly newsletter |
| <input type="checkbox"/> Create a print brochure | <input type="checkbox"/> Develop a direct mail newsletter
for a target market |
| <input type="checkbox"/> Invest in personal advertising | <input type="checkbox"/> Write 10 personal notes per week |
| <input type="checkbox"/> Invest in newspaper advertising
(online or print) | |

Build Your Business *(Task-Oriented and Interactive Activities)*

- | | |
|--|---|
| <input type="checkbox"/> Volunteer for marketing and
recruiting events | <input type="checkbox"/> Attend office meetings |
| <input type="checkbox"/> Attend local and national conventions | <input type="checkbox"/> Tour local listings |
| <input type="checkbox"/> Practice buyer/seller objection
handling scripts | <input type="checkbox"/> Attend training course |
| <input type="checkbox"/> Become more active in association activities | <input type="checkbox"/> Update your professional image |
| <input type="checkbox"/> Run for office at your local association | <input type="checkbox"/> Hire a personal or virtual assistant |
| | <input type="checkbox"/> Read professional books |
| | <input type="checkbox"/> Master a new computer program |

Marketing Budget Worksheet

Use the following worksheet to summarize and budget for your yearly activities.

First Quarter

New Years cards	\$
Open house invitations	\$
Listings/Sold/Participation announcements	\$
Personal marketing or advertising	\$
HUD/HUD-1 letter	\$
10 open houses	\$
Face-to-face visits	\$
Other:	\$
Other:	\$

Quarter Total \$

Second Quarter

Tech Investments	\$
Open House Invitations	\$
Listing/Sold/Participation announcements	\$
Personal marketing or advertising	\$
10 Open Houses	\$
Face-to-face visits	\$
Other:	\$
Other:	\$

Quarter Total \$

Third Quarter

Open House Invitations	\$
Listing/Sold/Participation announcements	\$
Personal marketing or advertising	\$
10 Open Houses	\$
Face-to-face visits	\$
Other:	\$
Other:	\$

Quarter Total \$

Fourth Quarter

Open House Invitations	\$
Listing/Sold/Participation announcements	\$
Personal Marketing or Advertising	\$
10 Open Houses	\$
Face-to-face Visits	\$
10 open houses	\$
Face-to-face visits	\$
Other:	\$
Other:	\$
Quarter Total	\$

YEARLY TOTAL **\$**

Monthly Marketing Calendar

In the box provided for each month, note the following: 1) mailing you will send, 2) events you will sponsor, and 3) pop-bys or items of value you will provide.

January	1)
	2)
	3)
February	1)
	2)
	3)
March	1)
	2)
	3)

April	1)
	2)
	3)
May	1)
	2)
	3)
June	1)
	2)
	3)
July	1)
	2)
	3)
August	1)
	2)
	3)
Septmeber	1)
	2)
	3)
October	1)
	2)
	3)
November	1)
	2)
	3)
December	1)
	2)
	3)

Weekly Activity Tracker

Week ending _____

	# of Contacts	# of Appts	Time Spent	Dollars Spent	# of Listings	# of Sales
Open Houses						
Advertising/Promotion						
Cold Calls						
Warm Calls						
Community Involvement						
Doors Knocked						
Expireds Contacted						
B2B Contacts						
Floor Time						
Follow Up Program						
FSBOs Contacted						
Mailings Sent						
Networking Meetings Attended						
Absentee Owners Contacted						
Past Clients Contacts						
Referrals Given						
Referrals Received						
Sphere of Influence Contacts						
Face-to-Face Visits						
Social Media Updates						
Website/Blog Posts						
Email						
TOTALS						
YEAR-TO-DATE						

Daily Activity Tracker

Date: _____

	# of Contacts	# of Appts	Time Spent	Dollars Spent	# of Listings	# of Sales
Open Houses						
Advertising/Promotion						
Cold Calls						
Warm Calls						
Community Involvement						
Doors Knocked						
Expireds Contacted						
B2B Contacts						
Floor Time						
Follow Up Program						
FSBOs Contacted						
Mailings Sent						
Networking Meetings Attended						
Absentee Owners Contacted						
Past Clients Contacts						
Referrals Given						
Referrals Received						
Sphere of Influence Contacts						
Face-to-Face Visits						
Social Media Updates						
Website/Blog Posts						
Email						
TOTALS						
YEAR-TO-DATE						

My 2015 Goals – Quick Reference

Fill in the important goals and metrics of your business plan so that you can have a quick reference to track your success throughout the year.



Income Goal for 2015	\$ _____
Number of Closings Needed	_____
Number of Listings Needed	_____
Number of Sales Needed	_____
Number of Prospects Needed	_____

Break it down:

Listings Needed per Week	_____
Sales Needed per Week	_____
# of Prospects to Contact per Week	_____

Getting Ready for Your Bigger, Better 2015

You CAN do it!

While your annual goals may seem daunting, it is your daily successes that are the best way to meet your goals. Set simple daily goals, such as learning one new thing, identifying two prospects, or adding a few people to your database. If you can stick to a daily, weekly, and monthly plan, your success will be in the bag.

Are you ready to build your bigger, better 2015?

Visit us at marketleader.com or call
1-800-976-2968 to find out how Trulia can
help you meet your goals and grow your 2015
business. It's time for your best year ever!