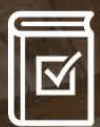


AGENT BUSINESS PLANNING

2 0 2 5



THE
ENCLAVE WAY

ANNUAL GOAL
THIS YEAR

VOLUME:
TRANSACTIONS:
GCI:
COMMISSION CHARGED:

BREAKDOWN:

BUYERS:

SELLERS:

AGENT GENERATED:

TEAM GENERATED:



What numbers do you need to THRIVE and what numbers do you need SURVIVE?

CLIENT
NUMBER

FOCUS AREA OBJECTIVES | ONE PER QUARTER

Every 90 days, what is one thing you want to improve upon to grow your business? Write one objective under each number.

1

2

3

4

WHAT WOULD YOU LIKE TO EXPLORE?



WHERE DOES YOUR BUSINESS COME FROM?

LAST YEAR

THIS YEAR

| SOURCE | SELLERS | BUYERS | % | SELLERS | BUYERS | % |
|------------------|---------|--------|---|---------|--------|---|
| RP | | | | | | |
| OPEN HOUSES | | | | | | |
| ZILLOW | | | | | | |
| SOCIAL MEDIA | | | | | | |
| INTERNET | | | | | | |
| NEW CONSTRUCTION | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| TOTALS: | | | | | | |

SELLERS + BUYERS
TOTALS:



WHO ARE YOUR PEOPLE?

MY PEOPLE:

How many do you have? How many do you want to add?

PORTFOLIO | FULLY DEVELOPED BOOK

CURRENT RP CONTACTS:

BIG RP GOAL NUMBER:



YOUR PORTFOLIO

How many are in your portfolio? How many are you willing to take care of?

PORTFOLIO COMMUNICATION PLAN

CONTACT | CARE | COMMUNITY

MY CTAs:

I'm committed to having...

CONVERSATIONS WITH MY RP

ABOUT? (Home value, market update, house updates, IOV, etc.)

HOW? (Text, phone, etc.)

FACE-TO-FACE MEETINGS

(Events, coffee, lunch, other.)

NOTES SENT/GIFTS/POP-BYS

FOR? (Just because, birthdays, home anniversary, etc.)

HOW WILL YOU KEEP IN CONTACT WITH THEM?

Brainstorm Ideas Here:



RELATIONSHIP PORTFOLIO ACTIVITIES

TOUCH POINT IDEAS

- Social media
 - Share and comment on posts
 - Birthday wishes
 - Birthday videos in Messenger
- Personal newsletter
- Focus on the kids
 - Gift sent to kids of clients
 - Card sent to kids of clients
- Birthday celebration
 - Email
 - Snail mail
 - Gift
 - Client giant
- A+ clients (special treatment) Pick top 10 to spoil
- Calendars or other swag
- Pop bys
 - Pumpkin carving sets
 - Ice cream in the summer
 - Enclave swag
 - Deliver flags
 - Other_____
- Invites (coffee, music, dinner)
- Calls to check in and for significant life events
- Homebot/EU calls
- Yearly anniversary check ins
 - Phone call
 - Snail mail
 - Pop-by
- Closing gifts/Thank-yous
 - Leave on doorstep
 - Gift at closing table
 - Take photo at closing
- Holiday Cards
- Video
 - Personalized (say their name)
 - Blast (to multiple)
- Events
 - Client party
 - Holiday party
 - Sporting event
 - Seminar
 - Charity event
 - Community event
 - Other_____
- Door knocking
 - Deliver stats sheets/Mini CMA
 - Seasonal repairs sheet
 - Zillow true or not sheet
- Text messages
- Handwritten notes
- Other:



I AM COMMITTED TO WORK HOURS A WEEK

PROSPECT & PORTFOLIO MANAGEMENT (20%)

When: _____ HOURS

FACE TO FACE (50%)

_____ HOURS

TRANSACTION MANAGEMENT (5%)

_____ HOURS

MARKETING/OPERATIONS (15%)

_____ HOURS

EDUCATION/MEETINGS (10%)

_____ HOURS

What adjustments need to be made?

Where to I do my best work?



BUSINESS EXPENSES

| ITEM | MONTHLY | ANNUALLY | NOTES |
|--|---------|----------|-------|
| INCOME | | | |
| EXPENSES | | | |
| Dues | | | |
| Business Development | | | |
| Coaching/Education | | | |
| Communication | | | |
| Equipment | | | |
| Print Ads | | | |
| Online Ads/Website | | | |
| Direct Mail | | | |
| Signs, Flyers, Brochures, Presentation Materials | | | |
| Promo (gifts, tickets, sponsorships) | | | |
| Client Events | | | |
| Misc. Sales Cost (agent paid inspections, repairs, etc.) | | | |
| Outside Services (consulting, book keeping, accounting/taxes) | | | |
| Travel Expenses | | | |
| Car Expenses | | | |
| IRA Contribution | | | |
| Wages (employees) | | | |
| Other | | | |
| TOTAL EXPENSES: | | | |
| TAXES: | | | |
| NET PROFIT: | | | |

AGENT BUSINESS PLANNING

2 0 2 5

en•clave

*a place or group that is different in character from
those surrounding it.*