

# Select Group Business Planning – Part 1



## First Step – What were your 2025 Goals

- Personal/spiritual goals

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- Family goals

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- Personal health goals

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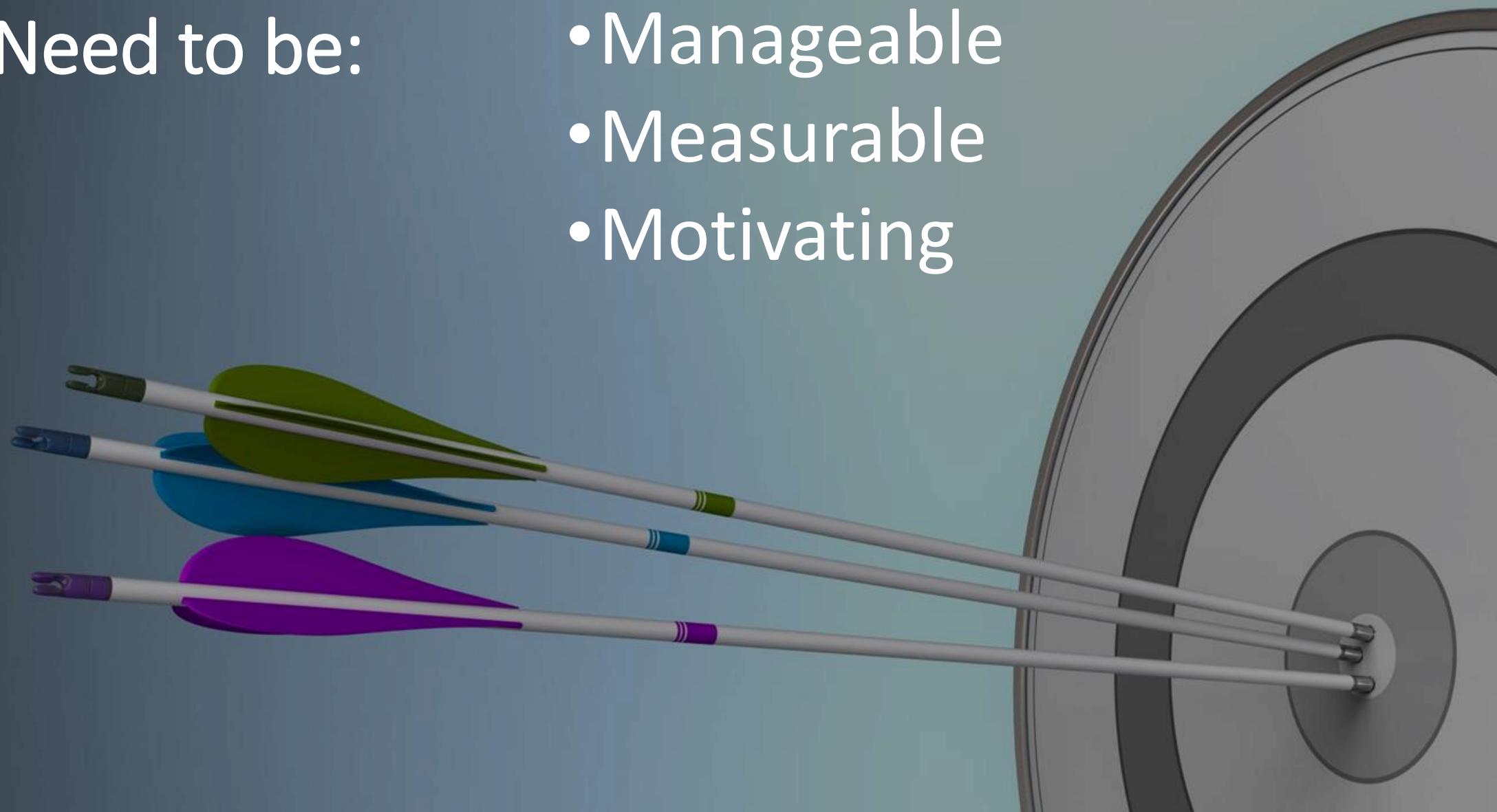
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- Business/Career goals

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A large, light gray target is positioned on the right side of the slide. Four arrows are shown hitting the bullseye. Three arrows are clustered together in the upper left quadrant of the target, while one arrow is positioned lower and to the right. The arrows have white shafts and green, blue, and purple fletchings.

Goals Need to be:

- Memorialized
- Manageable
- Measurable
- Motivating

# Why do most agents not set goals?



- Fear of failing
- No clear plan/path to get there
- Unmotivated

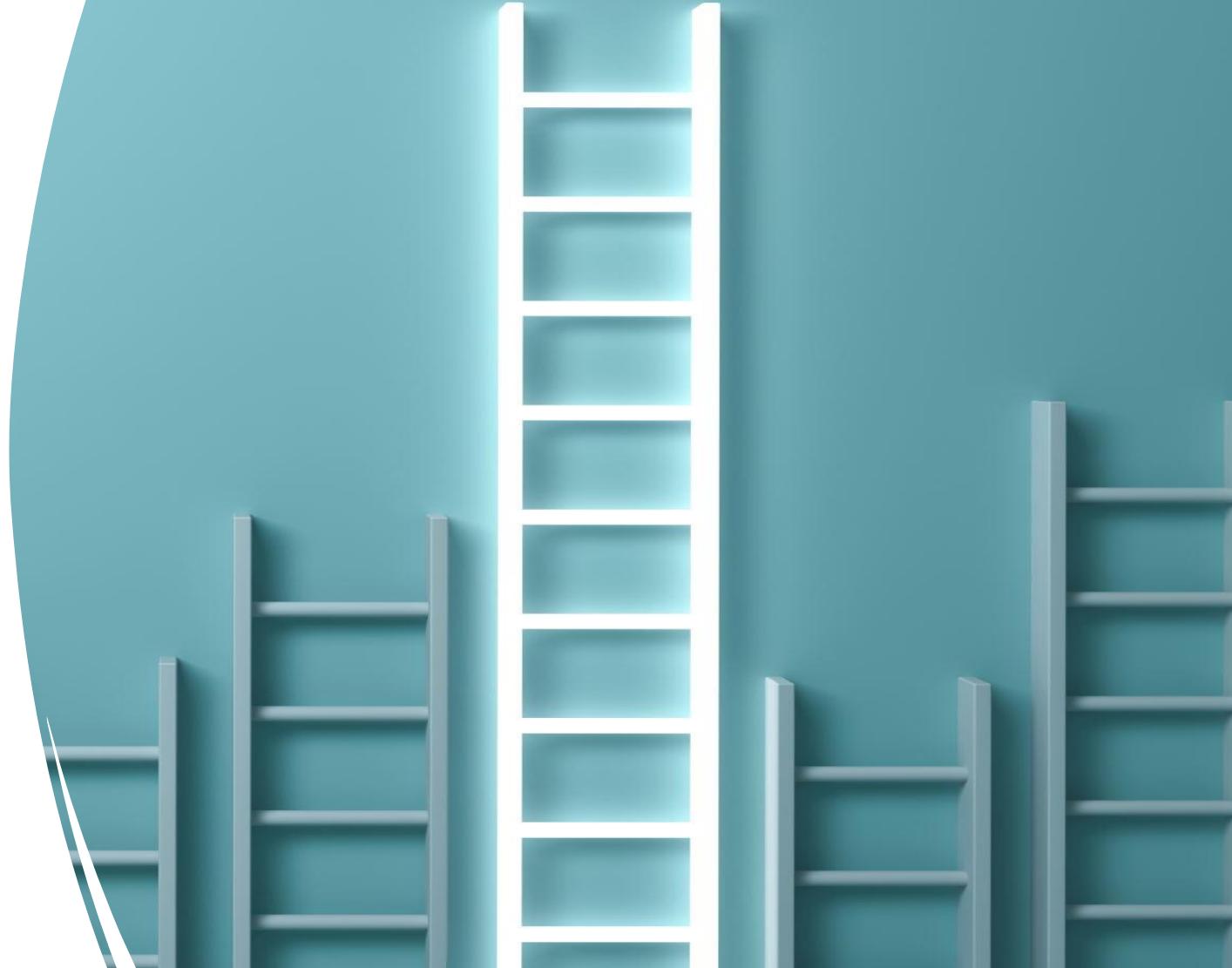
A goal without a plan  
is just a wish



## To set your goals do a business assessment for 2025

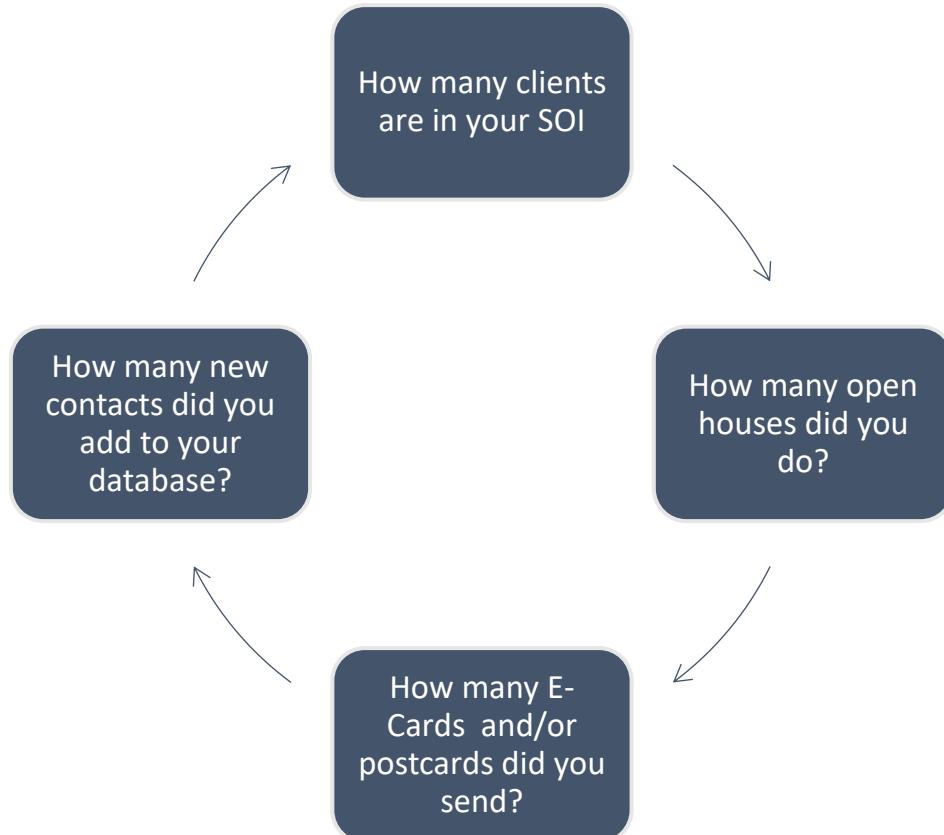
- How many listings did you take?
- How many of those listings did you close?
- How many buyers did you represent?
- How many of those buyers did you close?

If you are new or you didn't do any business in 2025 - you would skip this part of the Business Planning exercise



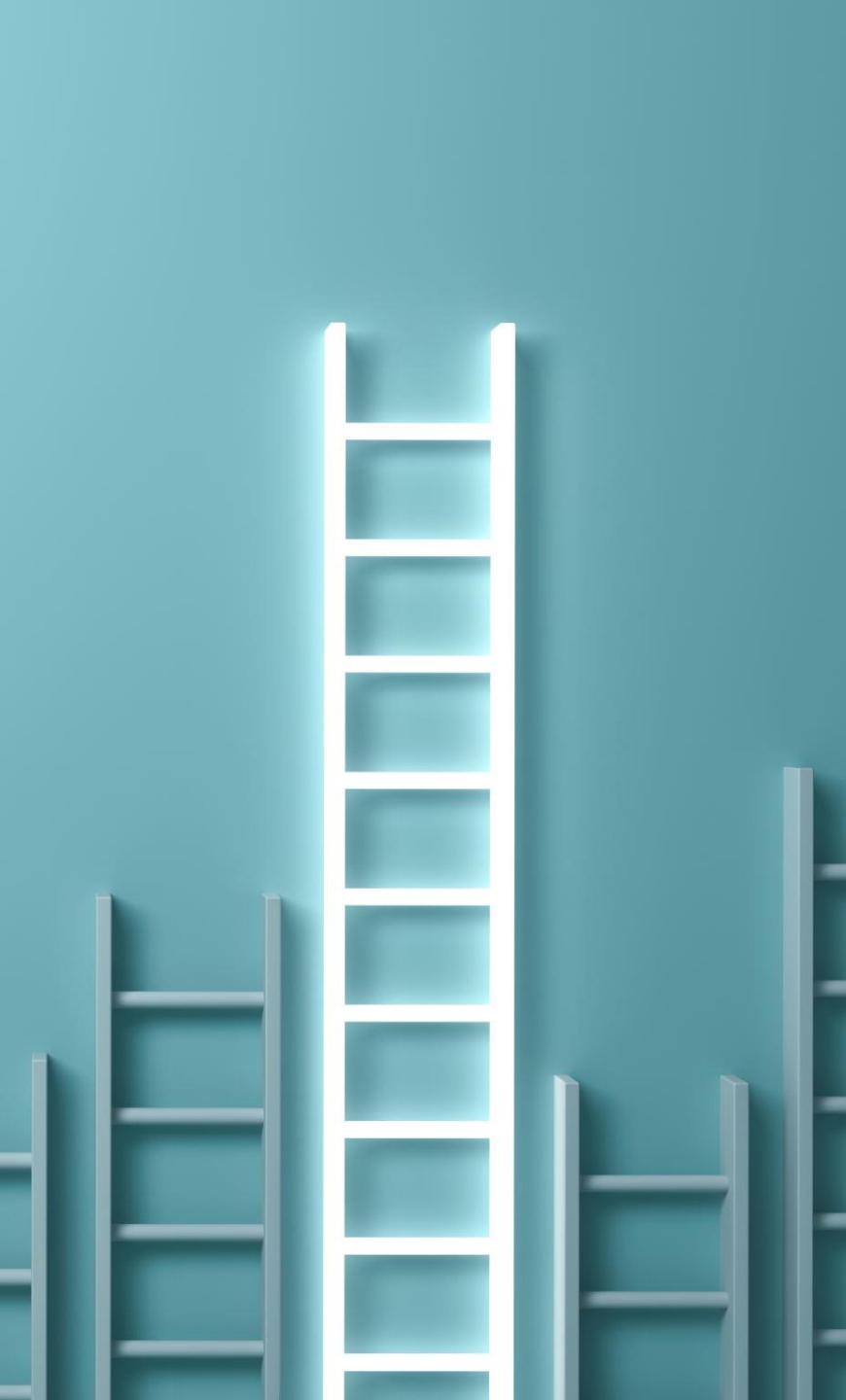
## In order to set your goals

where did your business come from in 2025?



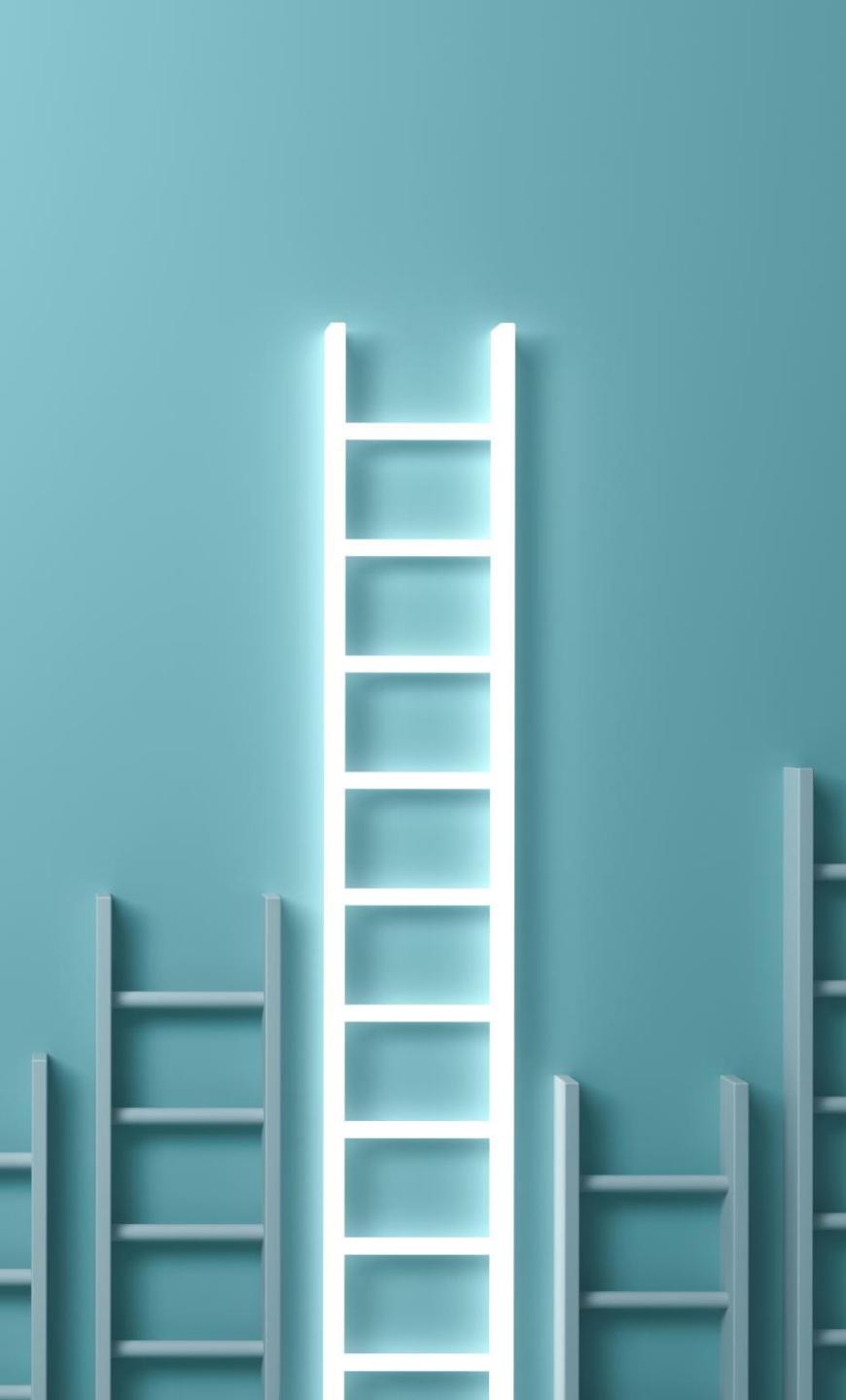
If you are new or you didn't do any business in 2025 - please complete as much of this part of the Business Planning exercise as possible





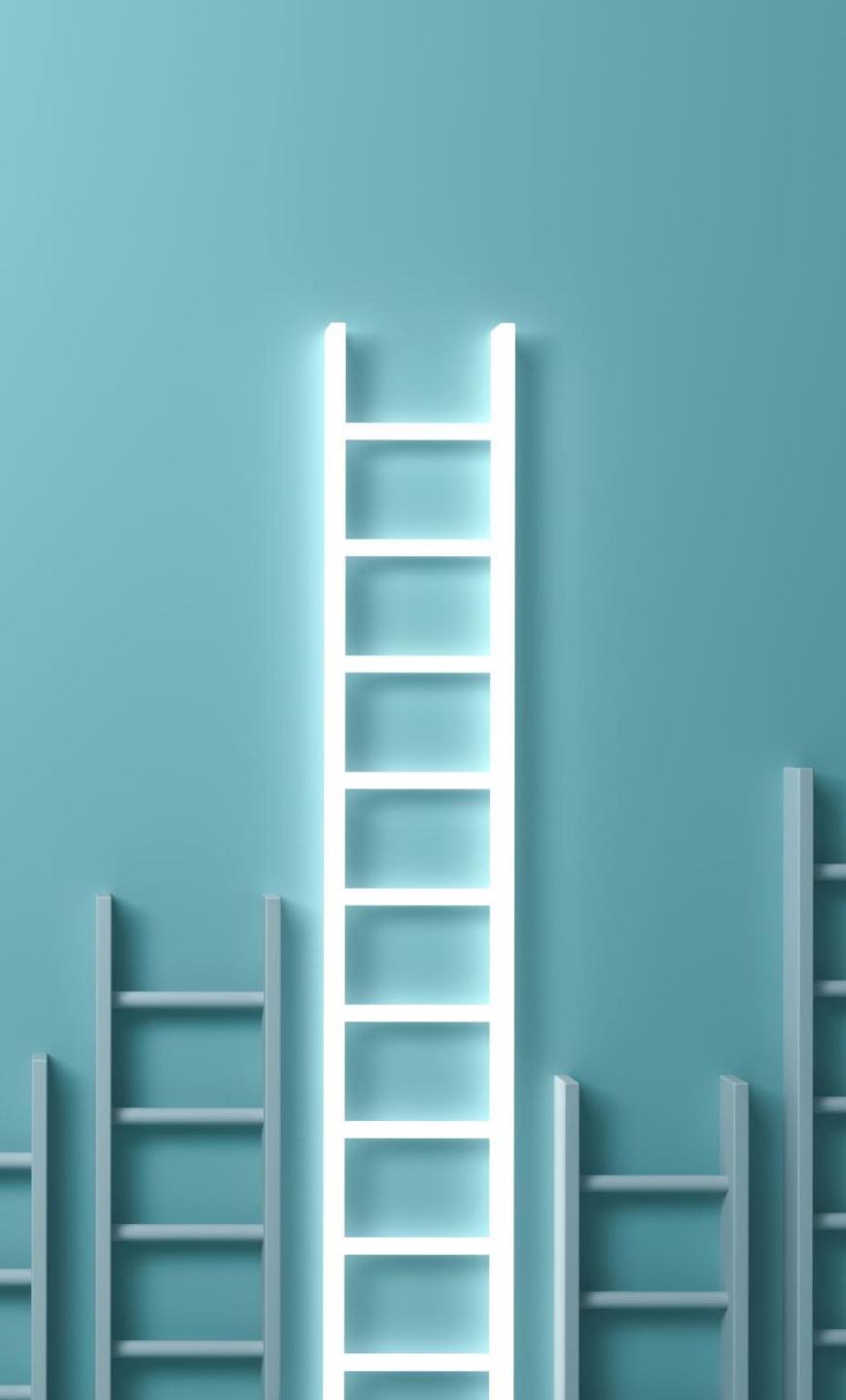
# In order to set your goals – where did all your business come from in 2025

- Total # of Listings taken \_\_\_\_\_
- Total # of listings closed \_\_\_\_\_
- Total # of contracts written \_\_\_\_\_
- Total # of contracts closed \_\_\_\_\_
- Total # of buyers you worked with \_\_\_\_\_
- Total # of houses shown \_\_\_\_\_
- Total # in your SOI/CRM \_\_\_\_\_
- Total # of new contacts added \_\_\_\_\_
- Total # of open houses held \_\_\_\_\_
- Total # of doors knocked \_\_\_\_\_
- Total # of prospecting calls made \_\_\_\_\_



# In order to set your goals – where did all your business come from in 2025

- Total # of SBDG Leads \_\_\_\_\_
- Total # of SBDG Leads converted \_\_\_\_\_
- Total # of Outbound referrals \_\_\_\_\_
- Total # of Inbound Referrals \_\_\_\_\_
- Total # of Networking Events \_\_\_\_\_
- Total # of social gatherings \_\_\_\_\_
- Total # of volunteer events \_\_\_\_\_
- Total # of bus. cards passed out \_\_\_\_\_
- Total # in your geographic farm \_\_\_\_\_
- Total pieces sent to your geo. Farm \_\_\_\_\_



# In order to set your goals – where did all your business come from in 2025

- Total # of Just Listed cards sent \_\_\_\_\_
- Total # of Just Sold cards sent \_\_\_\_\_
- Total # of RND cards sent \_\_\_\_\_
- Total # of “other” mailings sent \_\_\_\_\_
- Total # of E-cards sent \_\_\_\_\_
- Total # of Calls to your SOI \_\_\_\_\_
- Total # of Social Posts made \_\_\_\_\_
- Total # of Floor Time shifts \_\_\_\_\_
- Total # of Floor Leads \_\_\_\_\_
- Other \_\_\_\_\_
- Other \_\_\_\_\_



What was Your Closed Sides  
Goal for 2025 \_\_\_\_\_

Current Closings for 2025 \_\_\_\_\_

Closings still need to reach goal \_\_\_\_\_



# Will you hit your Closed Sides Goal for 2025? \_\_\_\_\_



If Yes – Reward yourself



If no – Reevaluate what  
went wrong but don't  
beat yourself up



If yes – consider increasing  
your 2026 goal



If no – consider making  
changes in 2026 to make  
your goal achievable

## Things to consider regarding your 2025 Plan



What were some of your best practices in 2025?

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## Things to consider regarding your 2025 Plan



What were some areas of missed opportunity in 2025?

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## Things to consider regarding your 2025 Plan



What were some things you could have done differently in 2025?

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## Things to consider regarding your 2025 Plan



What were some of the biggest lessons you learned in 2025?

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Total Closed Sides for 2025

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How many were sellers

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How many were buyers

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## Things to consider regarding your 2025 Plan



List your Primary Sources of business in 2025?

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## Things to consider regarding your 2025 Plan



List your Primary Sources of business in 2025?

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# List your personal business expenses for 2025

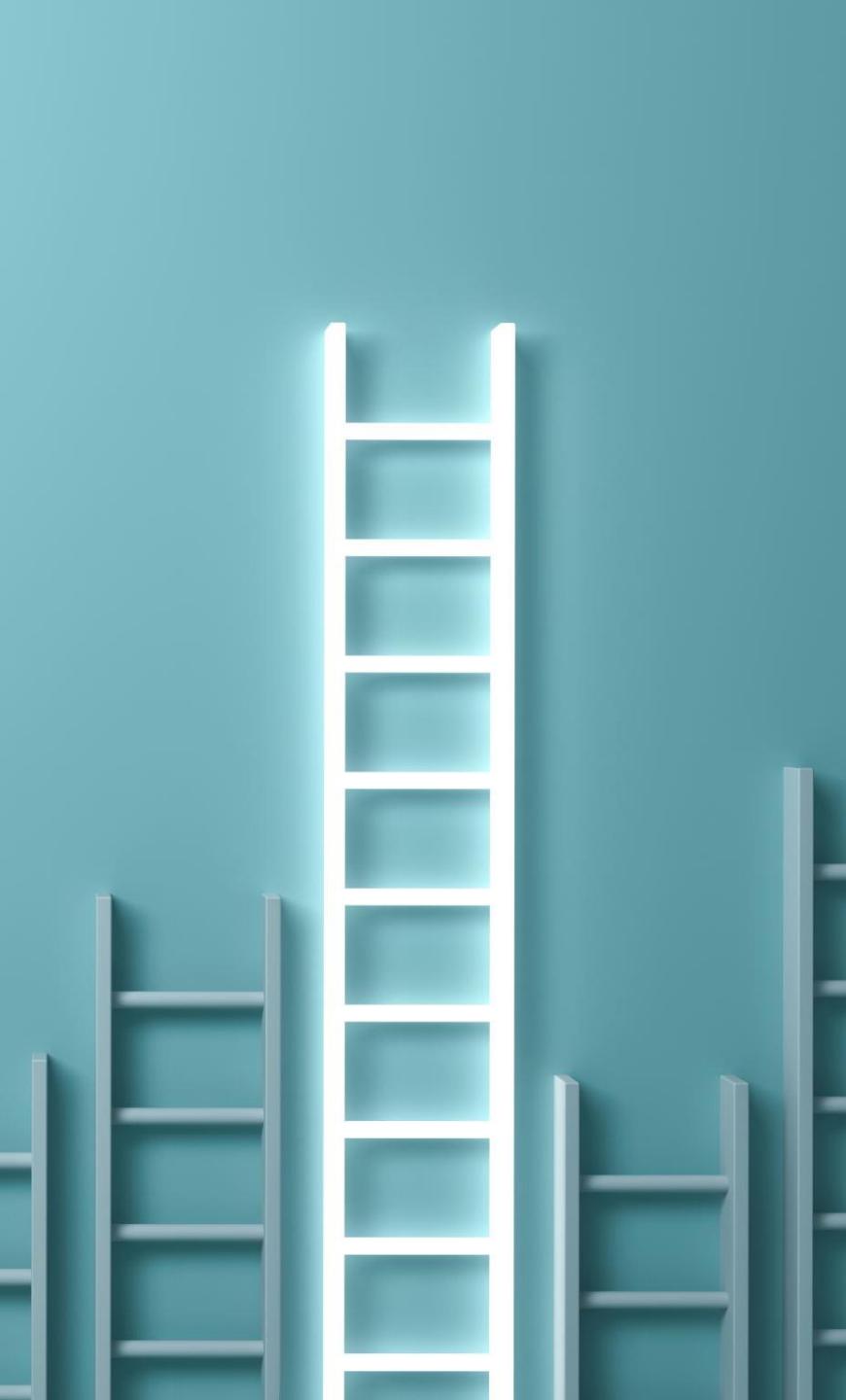


	Worth it	Do again
	Yes/No	Yes/No
<u>Purchased Leads</u>		
<u>Just Listed/Sold cards</u>		
<u>Calendars</u>		
<u>Homebot/AVM</u>		
<u>Client Gifts</u>		

# List your personal business expenses for 2025



	Worth it	Do again
<u>Realtor Next Door</u>	Yes/No	Yes/No
<u>Magazine Advertisement</u>	Yes/No	Yes/No
<u>Mailers/Other</u>	Yes/No	Yes/No
_____	Yes/No	Yes/No
_____	Yes/No	Yes/No



# List your personal business expenses for 2025

Worth it      Do again

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Yes/No      Yes/No

# How did you spend your business time in 2025



	Worth it	Do again
<u>Open Houses</u>	Yes/No	Yes/No
<u>Floor Time</u>	Yes/No	Yes/No
<u>Cold calling</u>	Yes/No	Yes/No
<u>Warm calling</u>	Yes/No	Yes/No
<u>Door Knocking</u>	Yes/No	Yes/No

# How did you spend your business time in 2025



Geographic Prospecting

Worth it      Do again

Yes/No      Yes/No

Networking for Referrals

Yes/No      Yes/No

\_\_\_\_\_

Yes/No      Yes/No

\_\_\_\_\_

Yes/No      Yes/No

\_\_\_\_\_

Yes/No      Yes/No

There are  
168 hours in  
every week



Use every minute  
wisely – you don't get  
that time back

**Weekly** Time Blocking is the best way  
to ensure you hit your goals!

- Set aside rest/sleep time
- Set aside personal time
- Set aside exercise time
- Set aside family time
- Set your business schedule



You should have 40-60 weekly work hours available to  
you to complete your tasks to reach your business goals

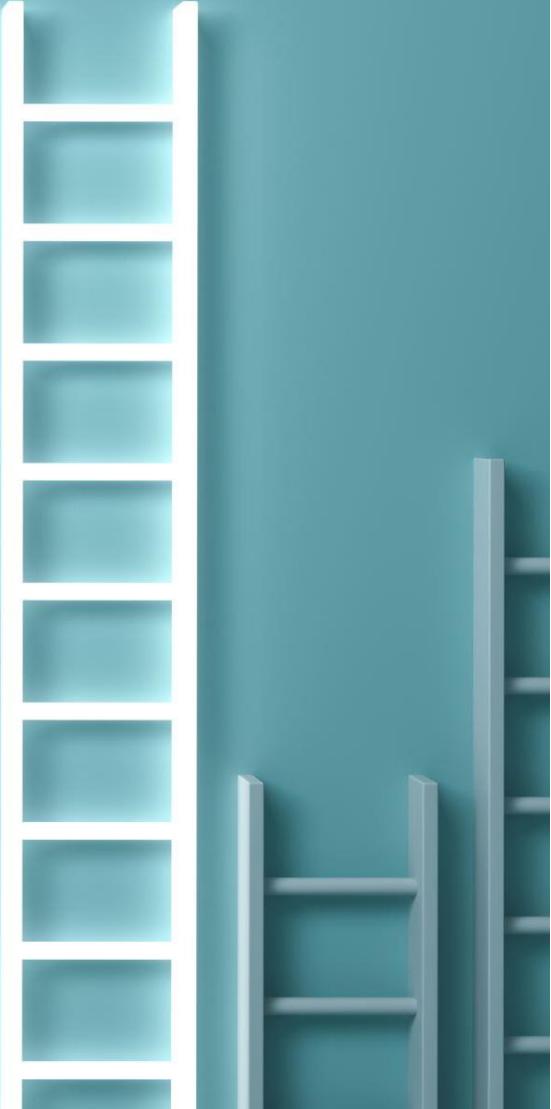
How did you do in 2025?

Monday	Tuesday	Wednesday	Thursday	Friday	
26	27	28	29	30	
5 AM					
6 AM	Gym Exercise - 6-7:30	Gym Exercise 6-7:30	Gym Exercise - 6-7:30	Gym Exercise 6-7:30	Gym Exercise 6-7:30
7 AM					
8 AM					
9 AM	Role Play - Practice Scripts	PCAR Meeting 8:30-10:00			
10 AM	Prospecting - Warm call 10-10:30	Prospecting - Warm Calls	Weekly Office Meeting 10-11		
11 AM	Door Knocking 11-12		Coaching session with Mike 11:30-12:30	Door Knocking 11-12	Open - My time 11-12
12 PM	Lunch 12:30-1:30	Lunch 12:30-1:30	Lunch 12:30-1:30	Lunch 12:30-1:30	Lunch 12:30-1:30
1 PM					
2 PM	Listing Appointments - Practice CMA - Practice RLA	Show or Preview Properties	Prospecting - Cold Calls	Show-Preview Properties	View New Housing Developments
3 PM					
4 PM					
5 PM					

Block Out your weekly schedule and stick to the plan

# Keep Track of Your Business Time

## How did you spend it?



Day

Monday

Morning

Tuesday

Afternoon

Wednesday

Thursday

Friday

Saturday

Sunday

## Are you Leveraging All of the Select Tools?



- ✓ Realtor Next Door
- ✓ Guaranteed Sale
- ✓ Refresh and Refurbish
- ✓ Foreclosure Rescue
- ✓ Just Listed/Just Sold
- ✓ E-Cards

# Are you Leveraging All of the Select Tools?



- ✓ Newsletter
- ✓ SNAP
- ✓ Website
- ✓ Training/Select Success

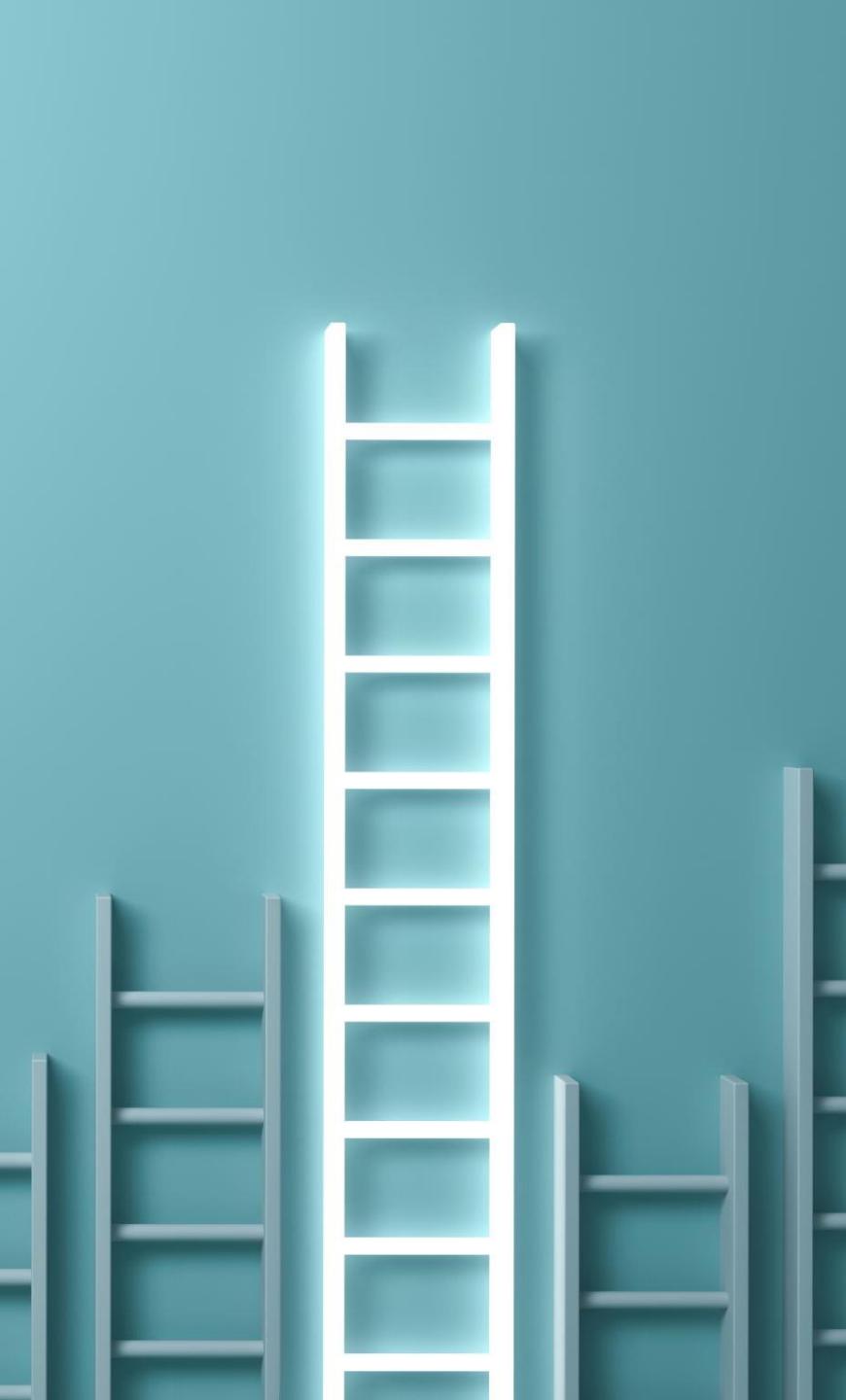
# Are you Leveraging All of the Select Tools?



- ✓ SBDG
- ✓ Buyer Protection Guarantee
- ✓ Select Concierge
- ✓ Select Property Management

# Select Group Business Planning – Part 2

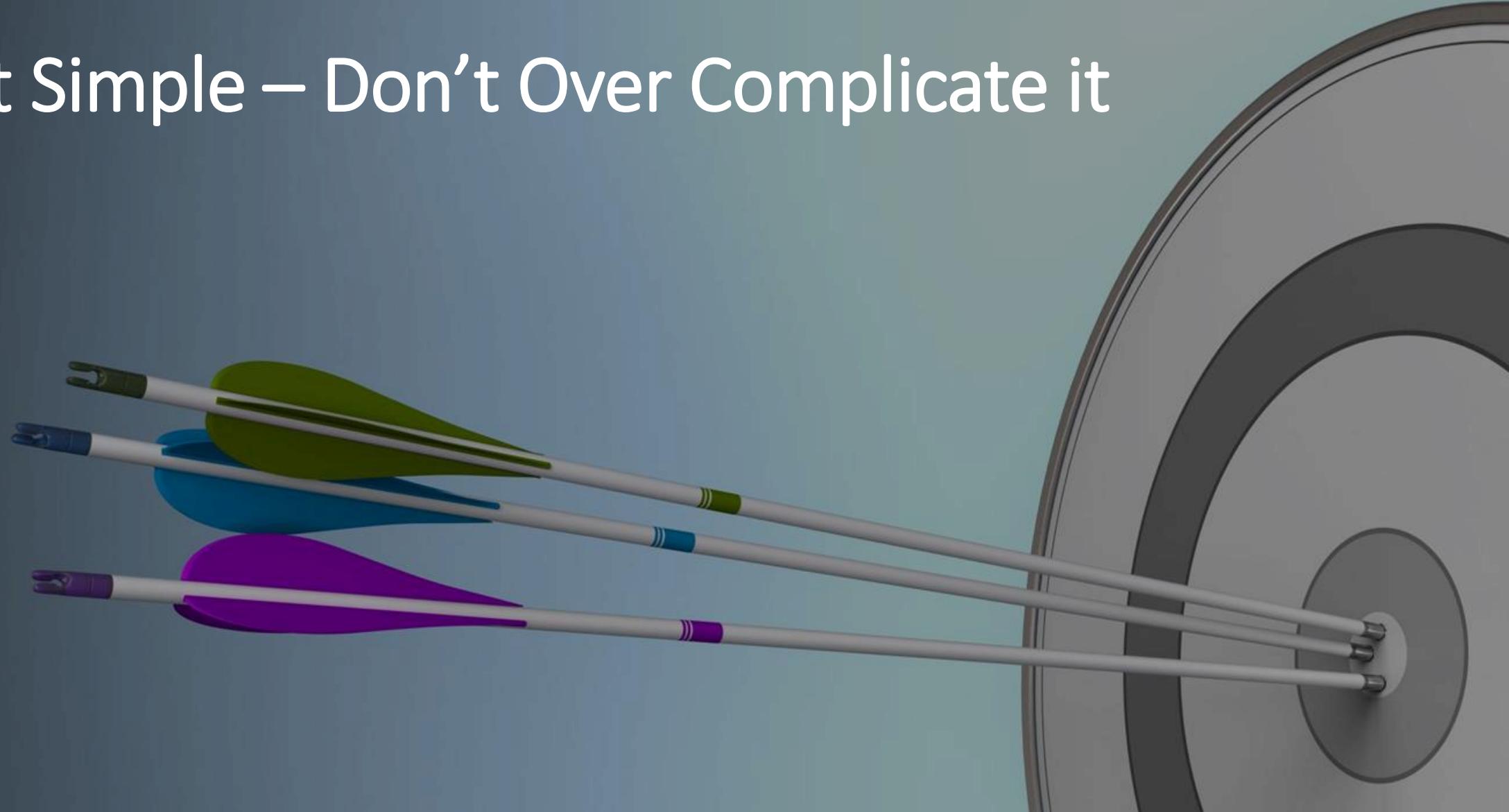


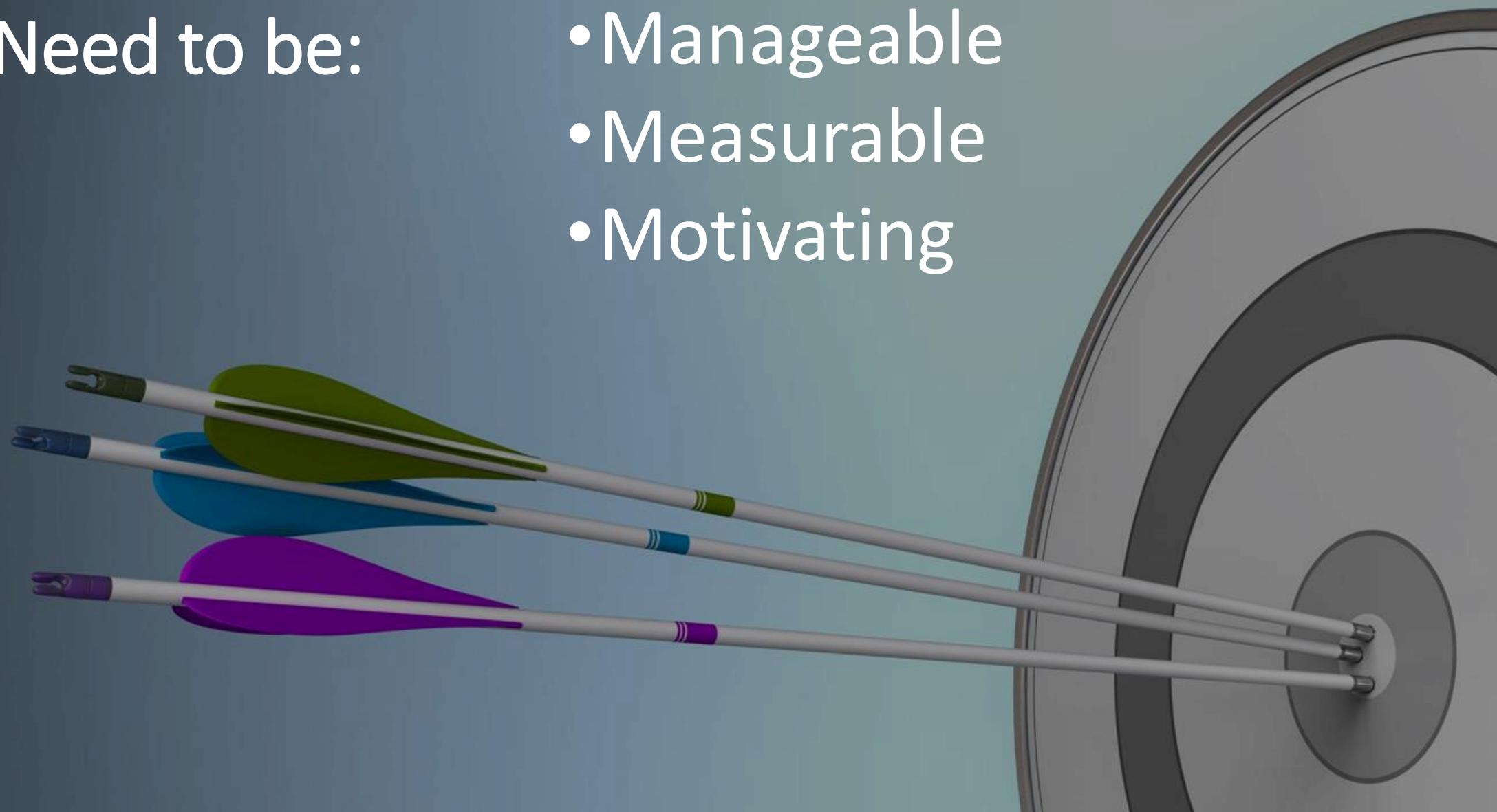


Which of these human needs  
drives or motivates you

- Stability
- Variety
- Significance
- Connection
- Growth
- Contribution

# Keep it Simple – Don't Over Complicate it



A large, light gray target is positioned on the right side of the slide. Four arrows are shown hitting the bullseye. Three arrows are clustered together in the upper left quadrant of the target, while one arrow is positioned lower and to the right. The arrows have white shafts and green, blue, and purple fletchings.

Goals Need to be:

- Memorialized
- Manageable
- Measurable
- Motivating

## Review your 2025 business assessment to see where/how you:

- Spent your time
- Spent your money
- Focused/Leveraged your strengths
- Took Risks
- Won some significant victories
- Suffered some defeats or became unfocused
- Other
- This is where you allow yourself to be honest and transparent as to how you ran your business



# Setting your 2026 Goals

- Personal/spiritual goals

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- Family goals

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- Personal health goals

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- Business/Career goals

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# 2026 Business/Career Goals

# Not everything has to be about the money

## Business/Career Goals

Example - I would like to get my Brokers license

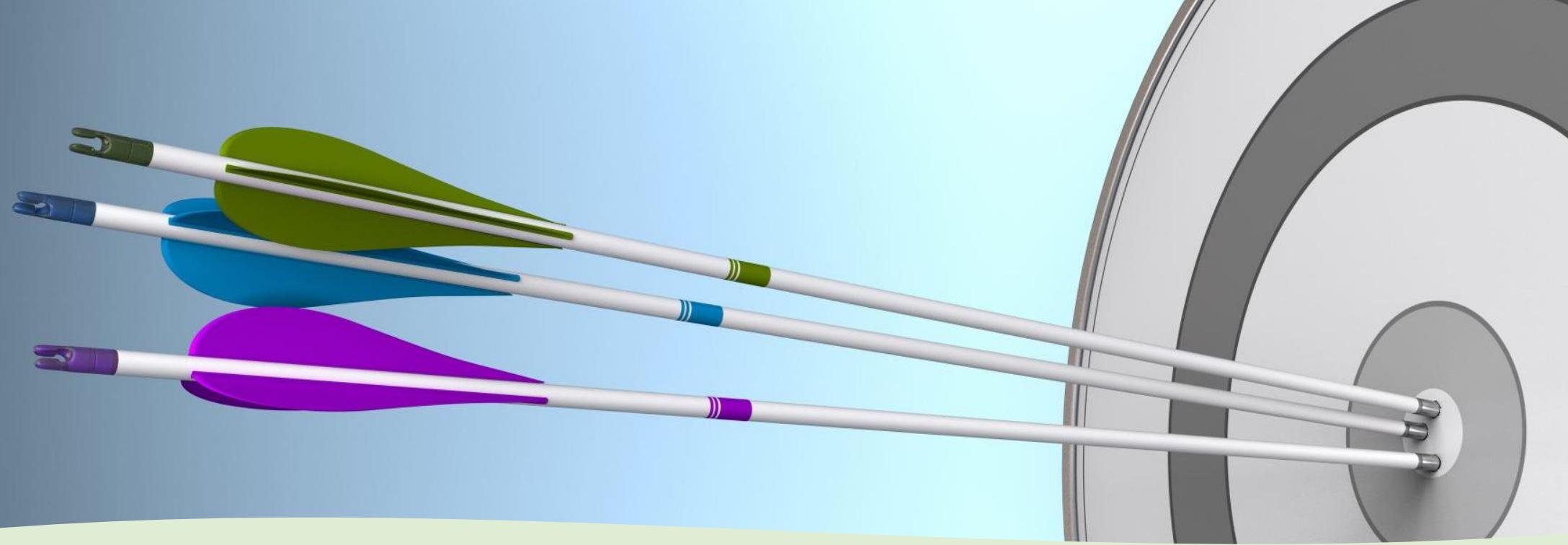


# Let's Talk About Your Financial Goals





**One Way to Calculate your 2026  
Financial Goals is to look at your net  
(1099) income for 2025**



Regarding my 2025 Net Income – I was:

Satisfied

Unsatisfied

I am new

I didn't earn any commission income

# Keep it Simple:

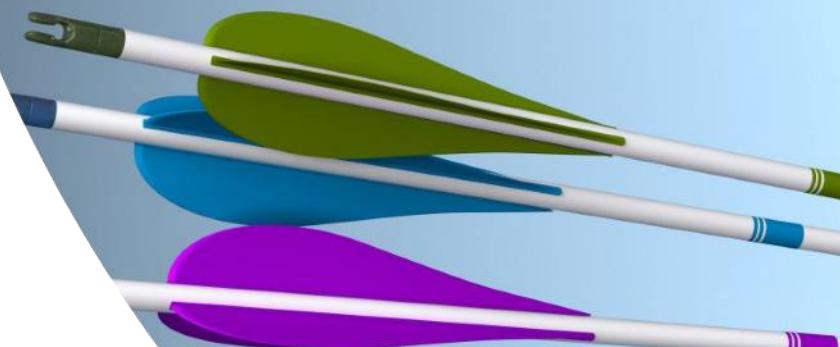
- Sales Volume – 3.5 Million
- Commission – 2.5%
- Gross Commissions - \$87,500
- Agent Split (80%) = \$70,000
- Minus fees (10%) from gross commission = \$8750
- Agent Net income = \$61,250

Average Price Point – \$500,000

Your Number to  
reach your net  
income goal of  
\$60,000

7

Increased sales volume and or  
increased closed units will increase  
your net income



If your agent split is lower than 80% - the estimated closed units to reach this goal (using the same gross commission numbers listed above) remains at approximately 7 units when you factor in the company CAP (to 90%) program of \$12,500



## Don't Forget the Variables:

SBDG – Adjust/Allow for a lower net

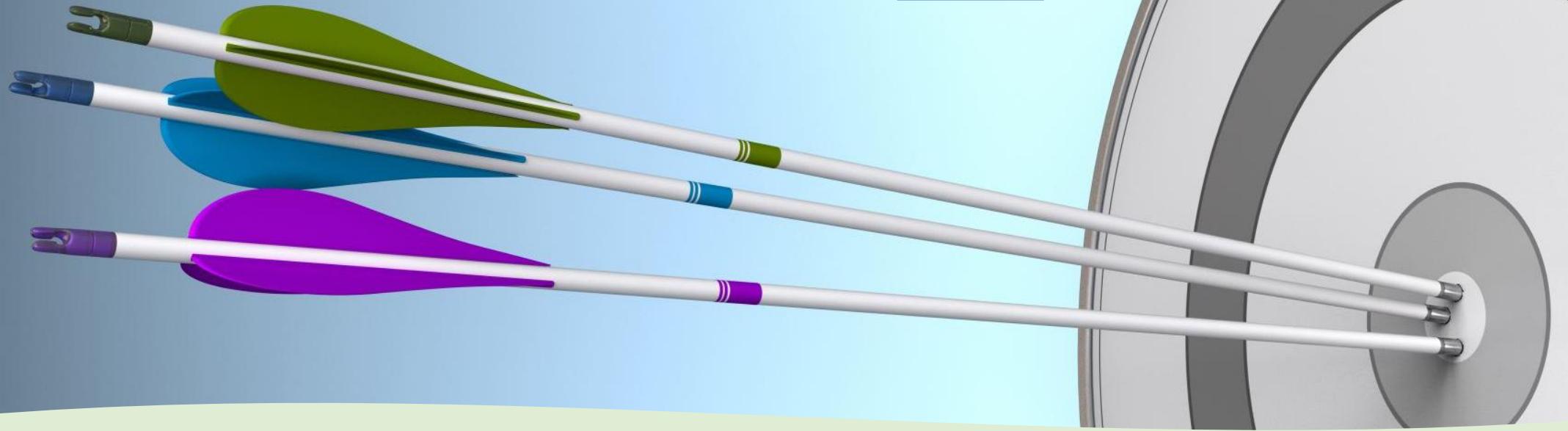
Personal Lead Purchases – that's your cost

Inbound Referral cost – adjusts the gross income

Commission concessions

# Know your number -

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Whatever method you use to arrive at your minimum closed sides to achieve your agent net – that's your goal

Try not to over think it – If all else fails place a number there that meets the required criteria

How do you plan to  
spend your business  
time in 2025?



There are  
168 hours in  
every week



Use every minute  
wisely – you don't get  
that time back

**Weekly** Time Blocking is the best way  
to ensure you hit your goals!

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You should have 40-60 weekly work hours available to  
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Block Out your weekly schedule and stick to the plan

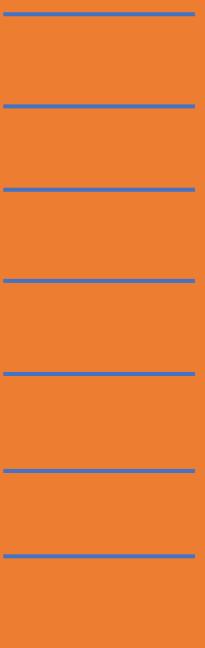
There are  
168 hours in  
every week



*It's your Actions  
not your plan  
that provides  
results*

## Suggested Business Activities to add to your calendar

- Take Listings
- Show property
- Write offers
- Add new contacts to your SOI
- Hold open houses
- Knock doors (10-10-20)
- Knock doors - prospecting
- Call SOI (once a quarter)



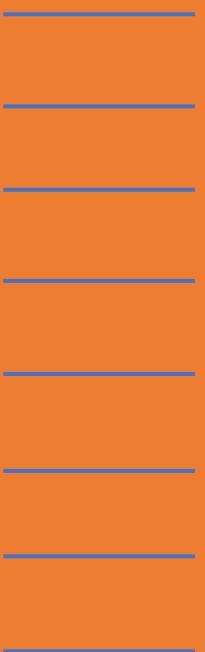
There are  
168 hours in  
every week



It's the little things  
that add up to a lot

## Suggested Business Activities to add to your calendar

- Send Just Listed Cards
- Send Just Sold Cards
- Send RND postcards
- Mail marketing postcards
- Make frequent social posts
- Cover scheduled floor time
- Maintain/update SBDG leads
- Make cold calls



There are  
168 hours in  
every week



*Sometimes you  
just need to think  
outside the box*

## Suggested Business Activities to add to your calendar

- Network for referrals
- Search for inbound referrals
- Make outbound referrals
- Attend social gatherings
- Volunteer your time
- Pass out business cards
- Target marketing - Geographic
- Direct Mail
- New home subdivision visits

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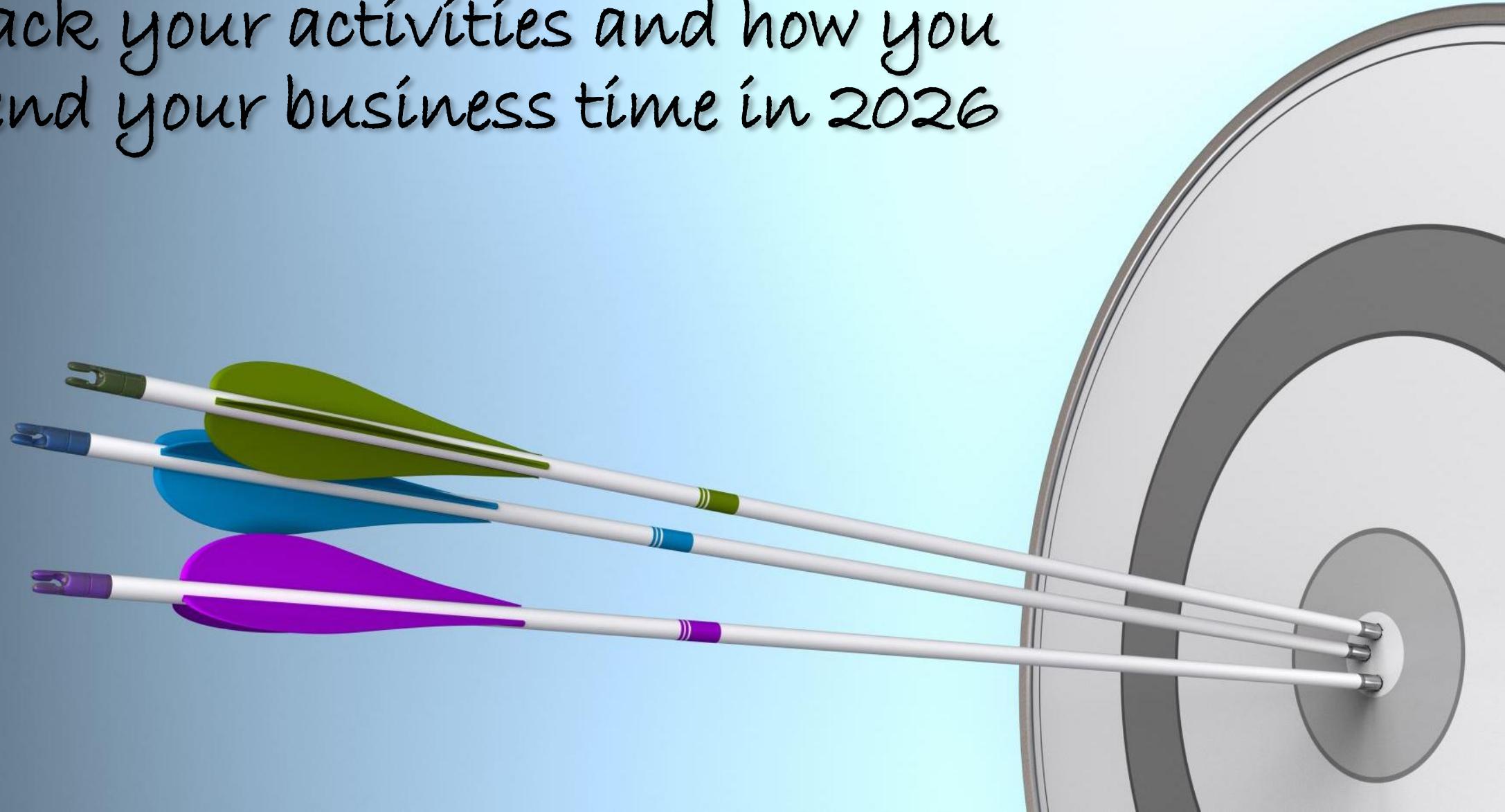
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Track your activities and how you  
spend your business time in 2026



## Agent Weekly Action Plan

Agent: \_\_\_\_\_

Office: \_\_\_\_\_ Week of: \_\_\_\_\_



Actions	Goal	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Educational Courses									
Meetings & Events									
Practice Dialogues									
Update Agent Profiles									
New Contacts									
Contacts Captured									
SOI Entries									
Setup Search Alerts									
Mail Announcements									
Just Listed / Just Sold Cards									
Realtor Next Door									
Floor Shifts									
Open Houses									
Doors Knocked									
Warm Calls									
Personal Leads & Referrals									
Client Lead Updates									
Company Leads & Referrals									
Company Lead Updates									
Client Showings									
Properties Shown									
Contracts Written									
Contracts Accepted									
Listing Presentations									
Listings Taken									
Sides Closed									

- Meet weekly, review previous week's actions, set new goals and discuss opportunities and challenges
- Educational courses may be Pre-License, Career Development, Post License and Continuing Education
- Meetings and events may include office, association, networking and special events

THIS WEEK: \_\_\_\_\_



1. I am most pleased with:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Opportunities for improvement:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. My biggest challenge is:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4. My priority for next week is:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

5. The best way that my manager can support me this week is:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

6. I need additional instruction on:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

7. Manager comments:

\_\_\_\_\_

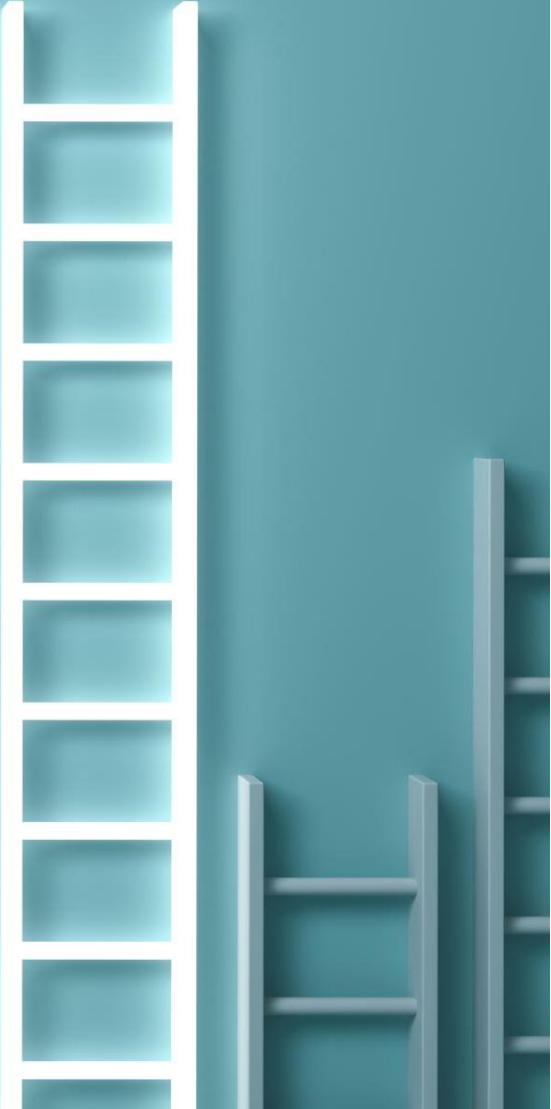
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Attended my office meeting \_\_\_\_\_ Yes \_\_\_\_\_ No      Met with my manager \_\_\_\_\_ Yes \_\_\_\_\_ No

# Keep Track of Your Business Time

## How did you spend it?



Day

Monday

Morning

Tuesday

Afternoon

Wednesday

Thursday

Friday

Saturday

Sunday

A Good Business Plan looks for ways to improve



Improving your Business Practices helps to increase your revenue

## Things to consider regarding your 2026 Plan

Incorporate your best business practice/s from 2025 into your 2026 plan

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A Good Business  
Plan looks for ways  
to improve



Implementing  
Missed Opportunities  
helps to increase  
your revenue

## Things to consider regarding your 2026 Plan

Choose some missed  
opportunities from 2025 and  
incorporate into your 2026 plan

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A Good Business  
Plan looks for ways  
to improve



Improving the  
quality of service  
helps to increase  
your revenue

## Things to consider regarding your 2026 Plan

List some things you would do  
differently in 2026 than how you  
did them in 2025

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2026 is right around the corner

Get ready to hit the  
ground running

This is  
where  
your plan  
gets real

# Homework

2025

Quarter 4 – List your closing prospects

2026

Quarter 1 – List your closing prospects

2026

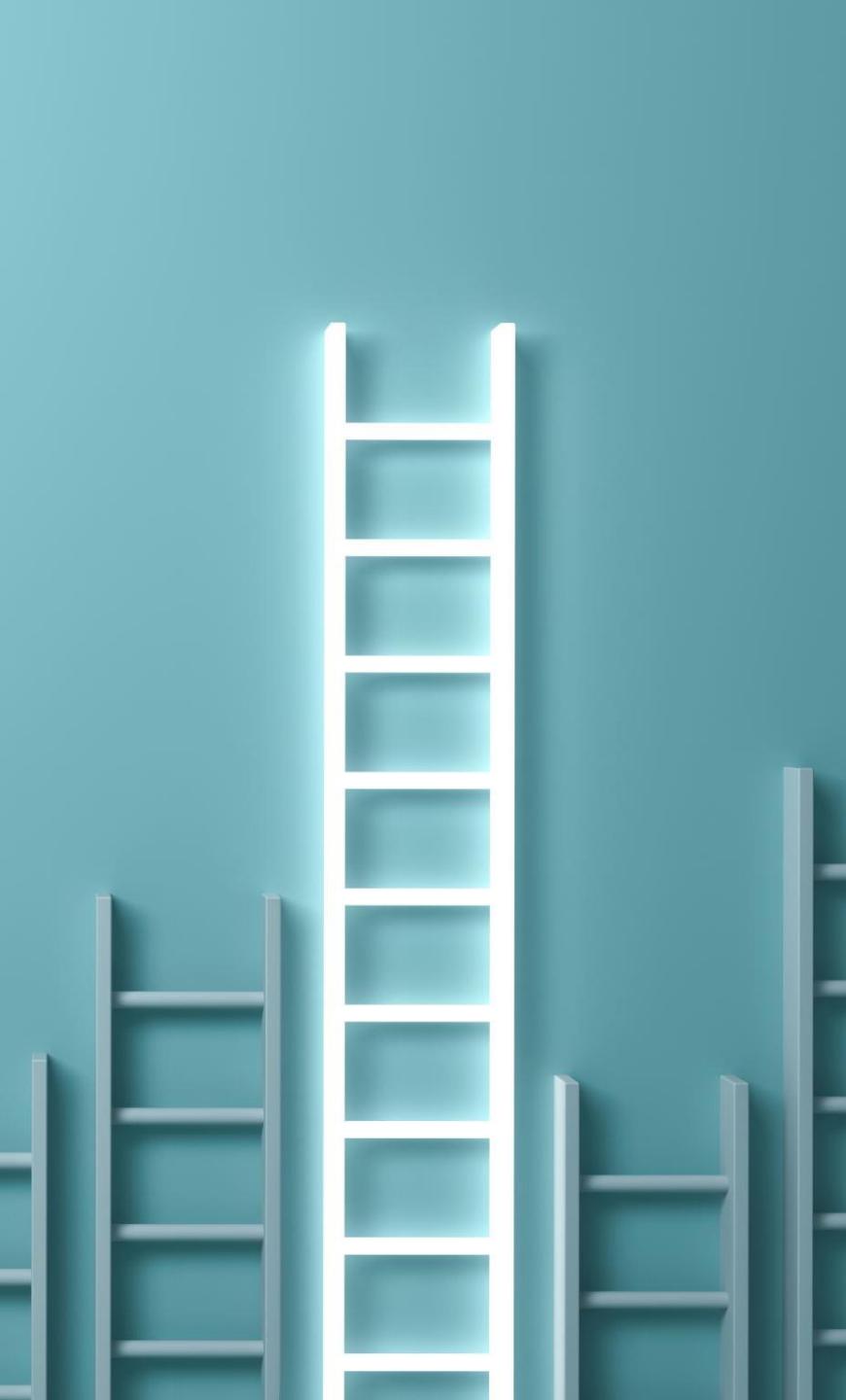
Quarter 2 – List your closing prospects

2026

Quarter 3 – List your closing prospects

2026

Quarter 4 – List your closing prospects



List your top 5 prospects for  
4th quarter 2025

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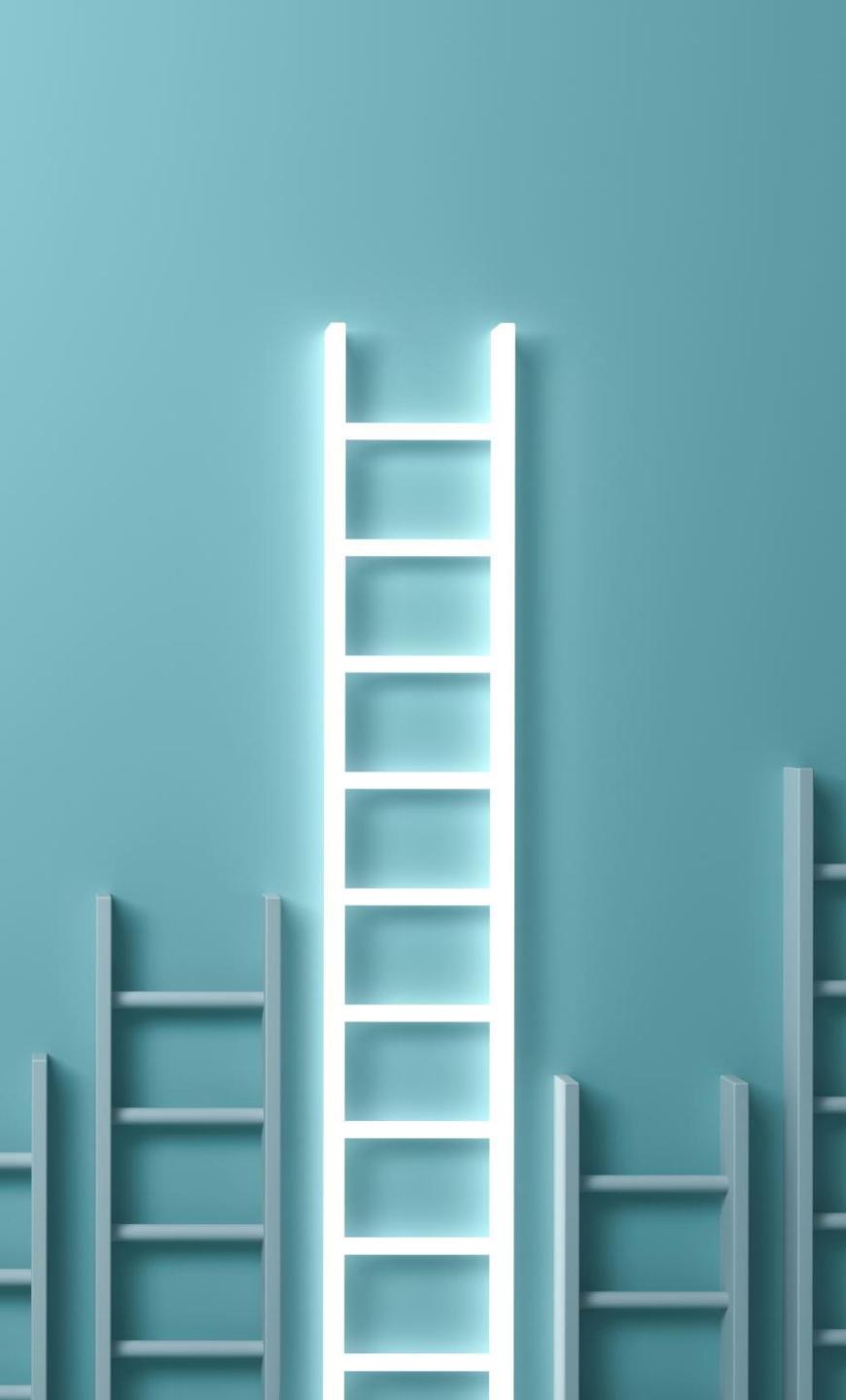
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List your top 5 prospects for  
1st quarter 2026

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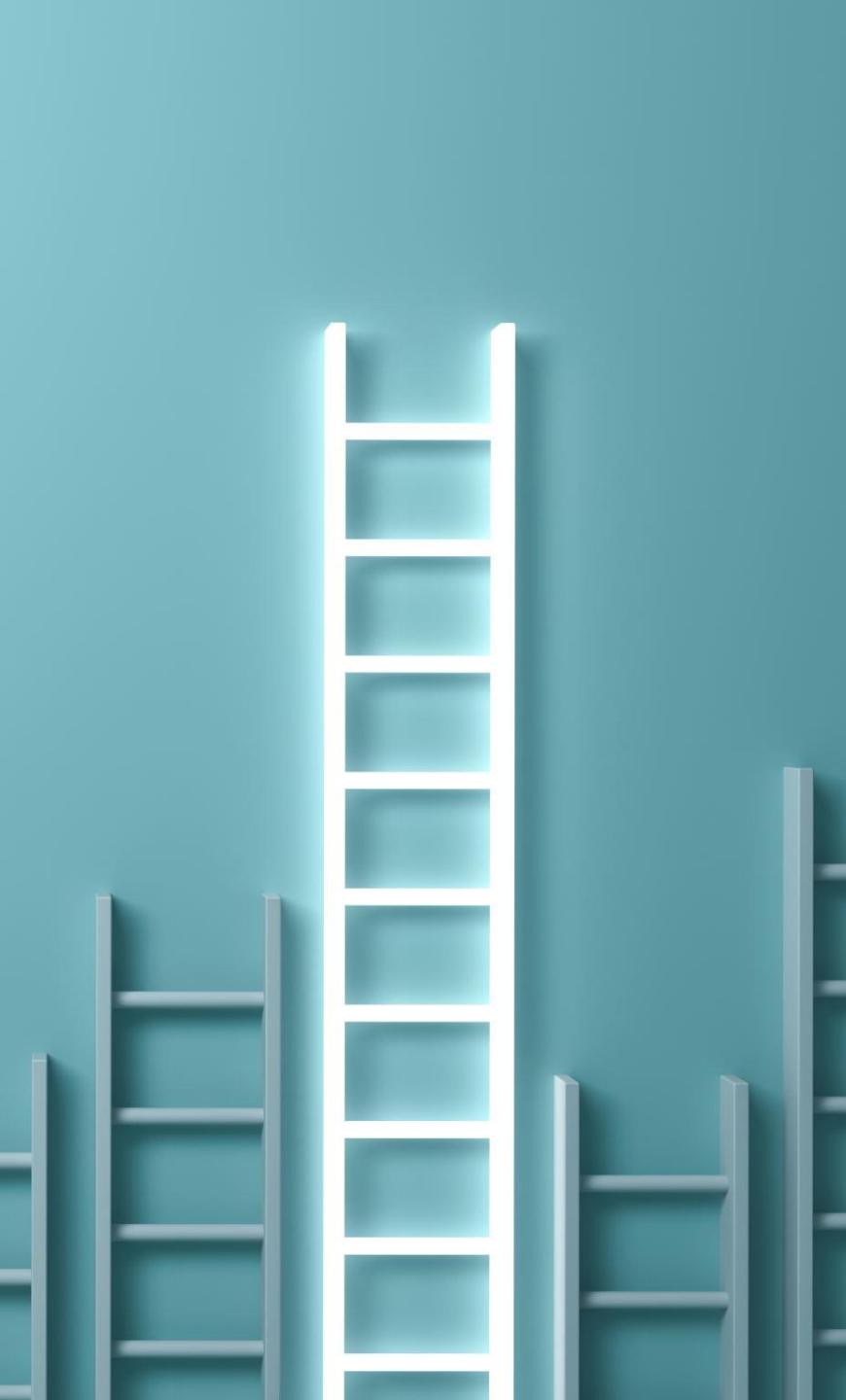
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List your top 5 prospects for  
2nd quarter 2026

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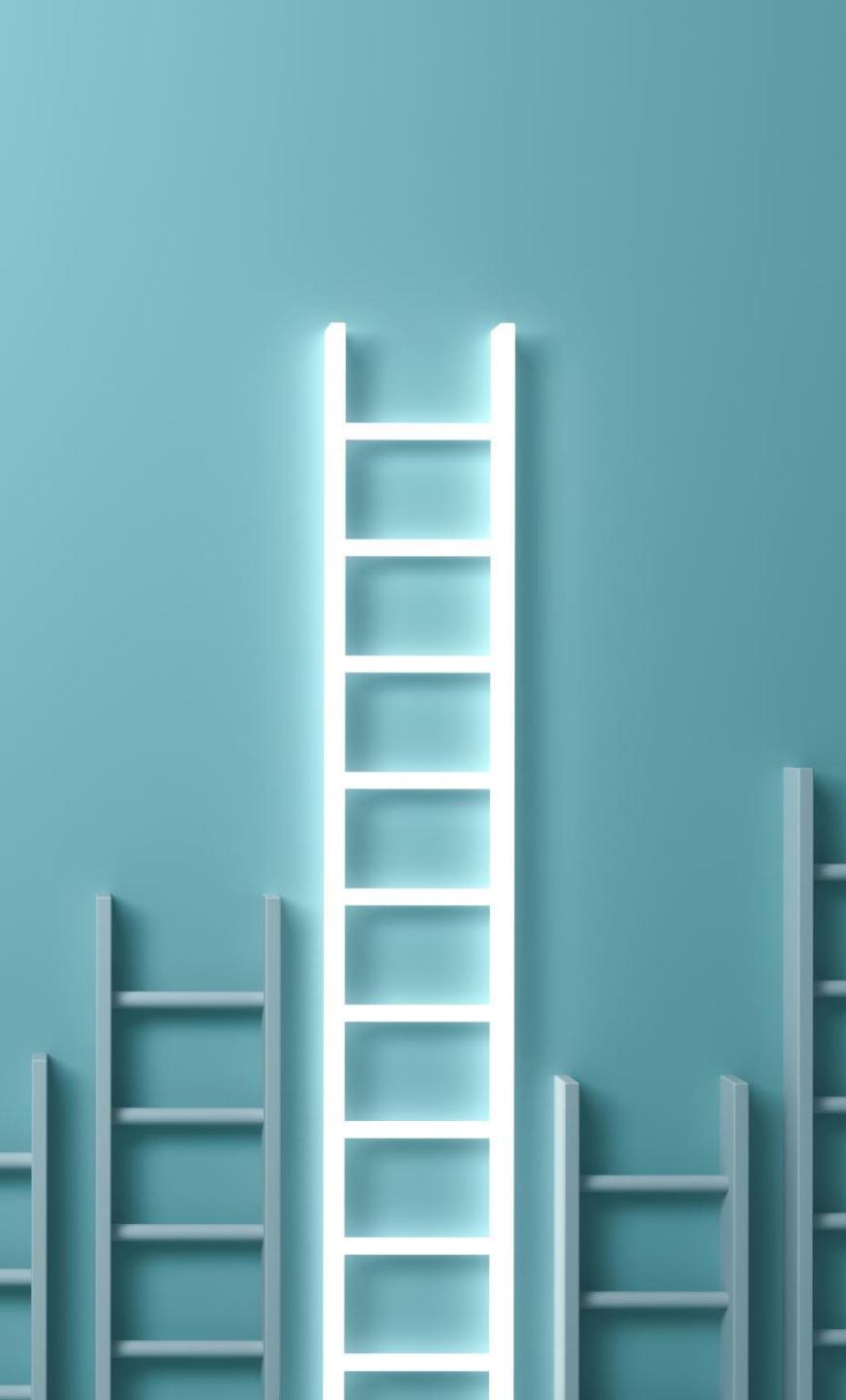
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List your top 5 prospects for  
3rd quarter 2026

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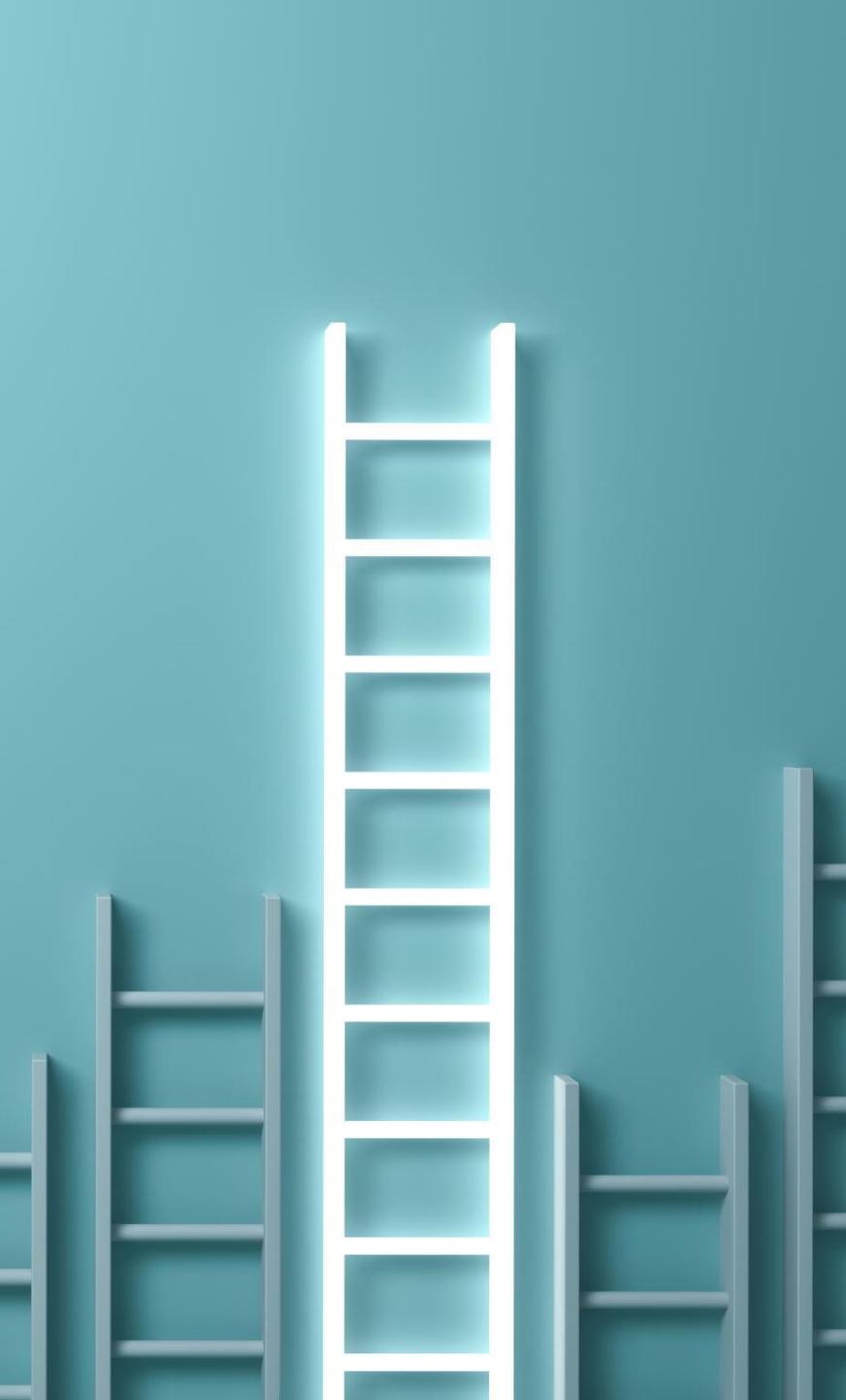
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List your top 5 prospects for  
4th quarter 2026

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2026 is right around the corner

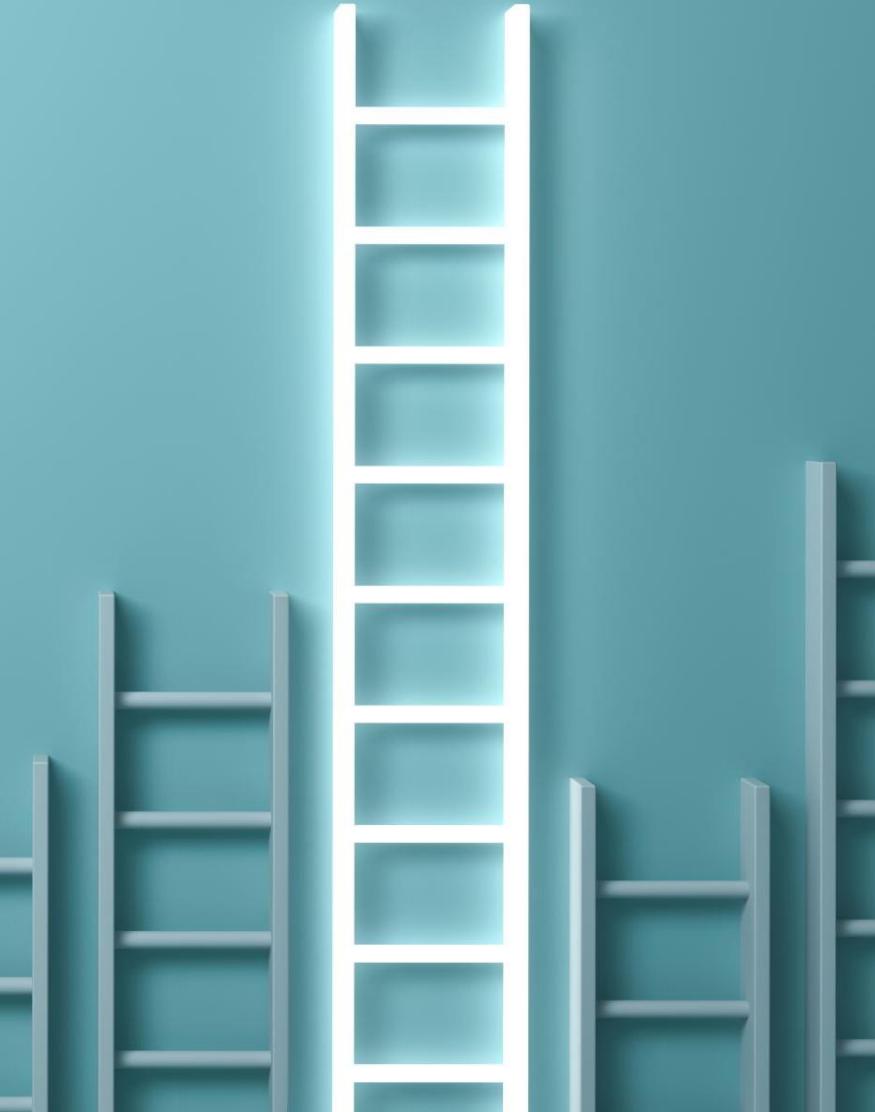
Get ready to hit the  
ground running

This is  
where  
your plan  
gets real

# Miscellaneous Thoughts and Notes



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