

Select Group Business Planning – Part 1

My 2025
Plan



First Step – What were your 2025 Goals

- Personal/spiritual goals

- Family goals

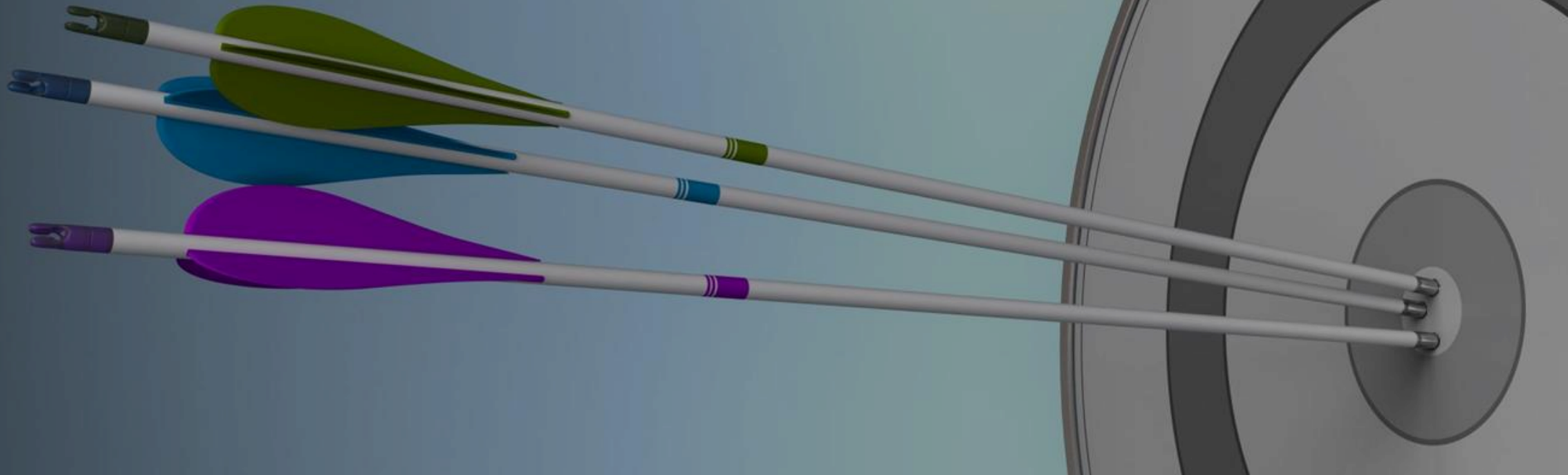
- Personal health goals

- Business/Career goals



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

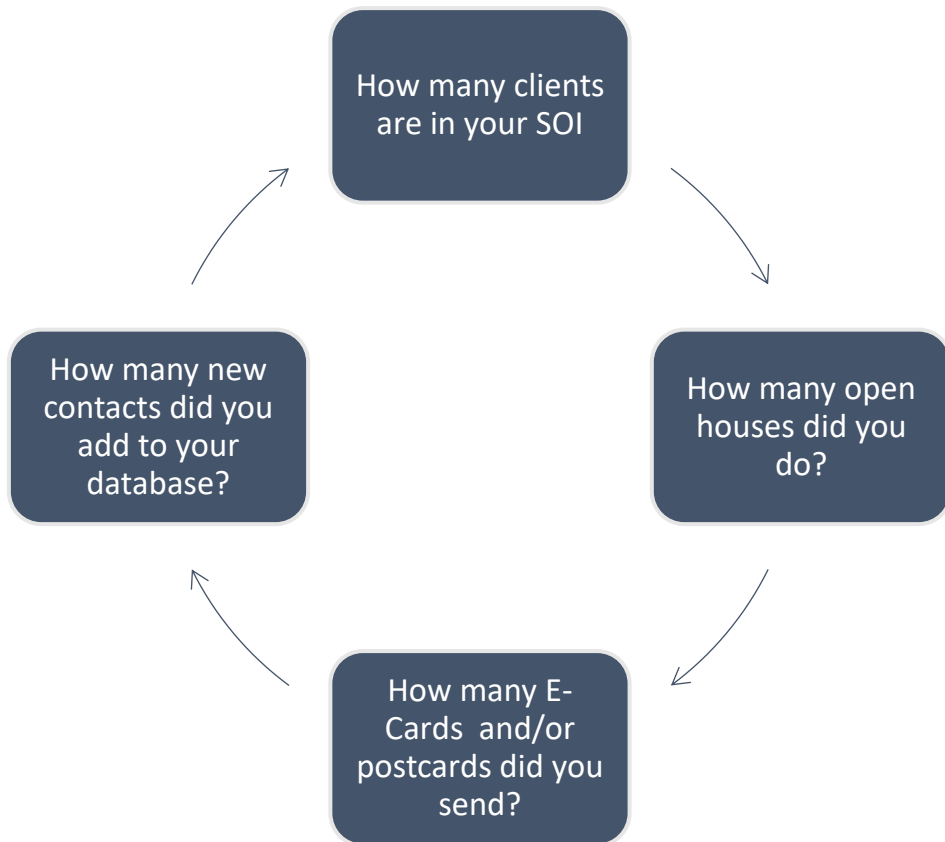
- How many listings did you take?
- How many of those listings did you close?
- How many buyers did you represent?
- How many of those buyers did you close?

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

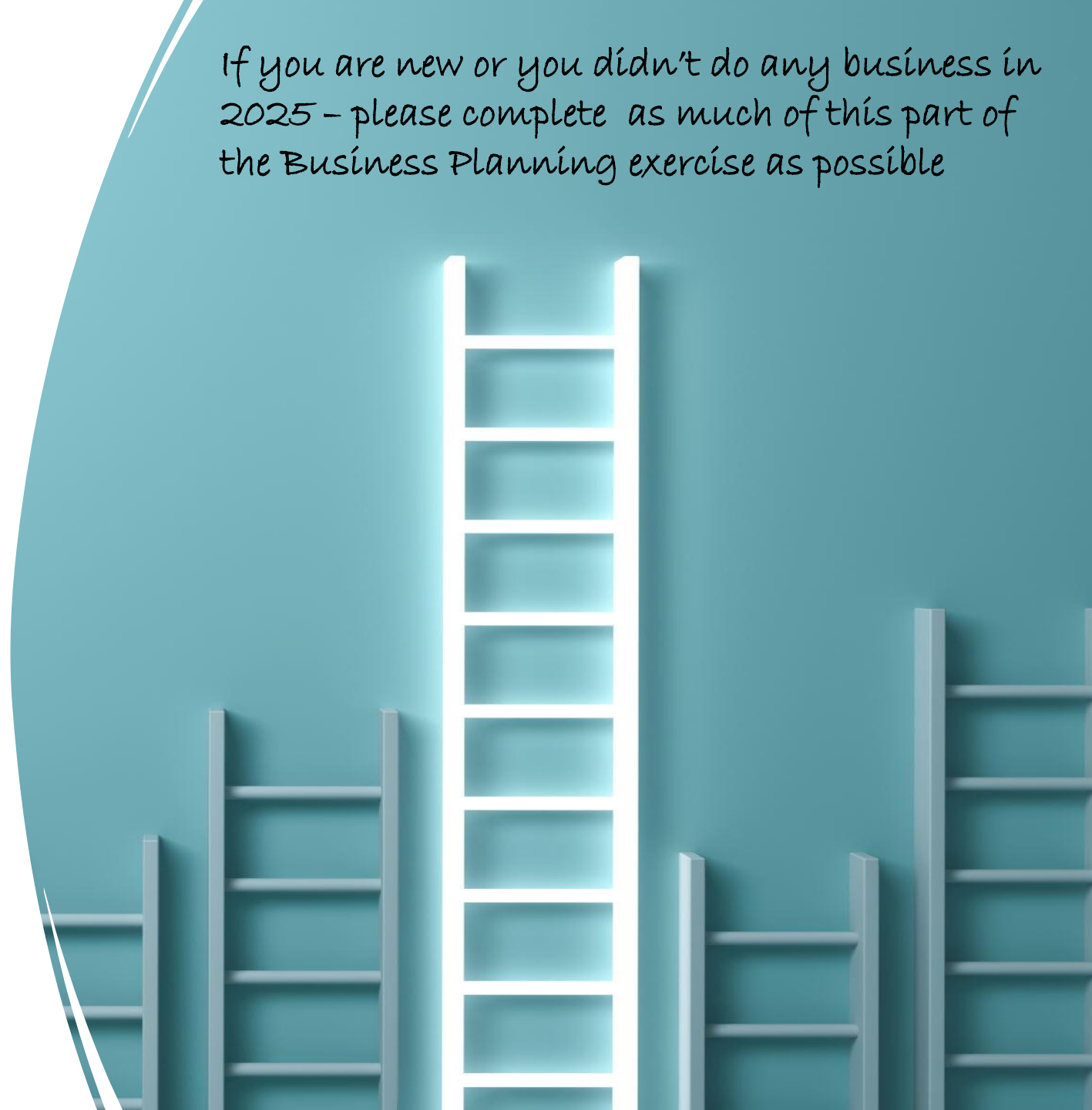


In order to set your goals

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 you 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 yes – consider increasing your 2026 goal



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



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?

Things to consider
regarding your 2025 Plan



What were some areas of missed opportunity in 2025?

Things to consider
regarding your 2025 Plan



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

Things to consider
regarding your 2025 Plan



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



Total Closed Sides for 2025

How many were sellers

How many were buyers

Things to consider
regarding your 2025 Plan



List your Primary Sources of
business in 2025?

Things to consider
regarding your 2025 Plan



List your Primary Sources of
business in 2025?



List your personal business expenses for 2025

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

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
_____	Yes/No	Yes/No
_____	Yes/No	Yes/No
_____	Yes/No	Yes/No
_____	Yes/No	Yes/No
_____	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

	Worth it	Do again
<u>Geographic Prospecting</u>	Yes/No	Yes/No
<u>Networking for Referrals</u>	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!

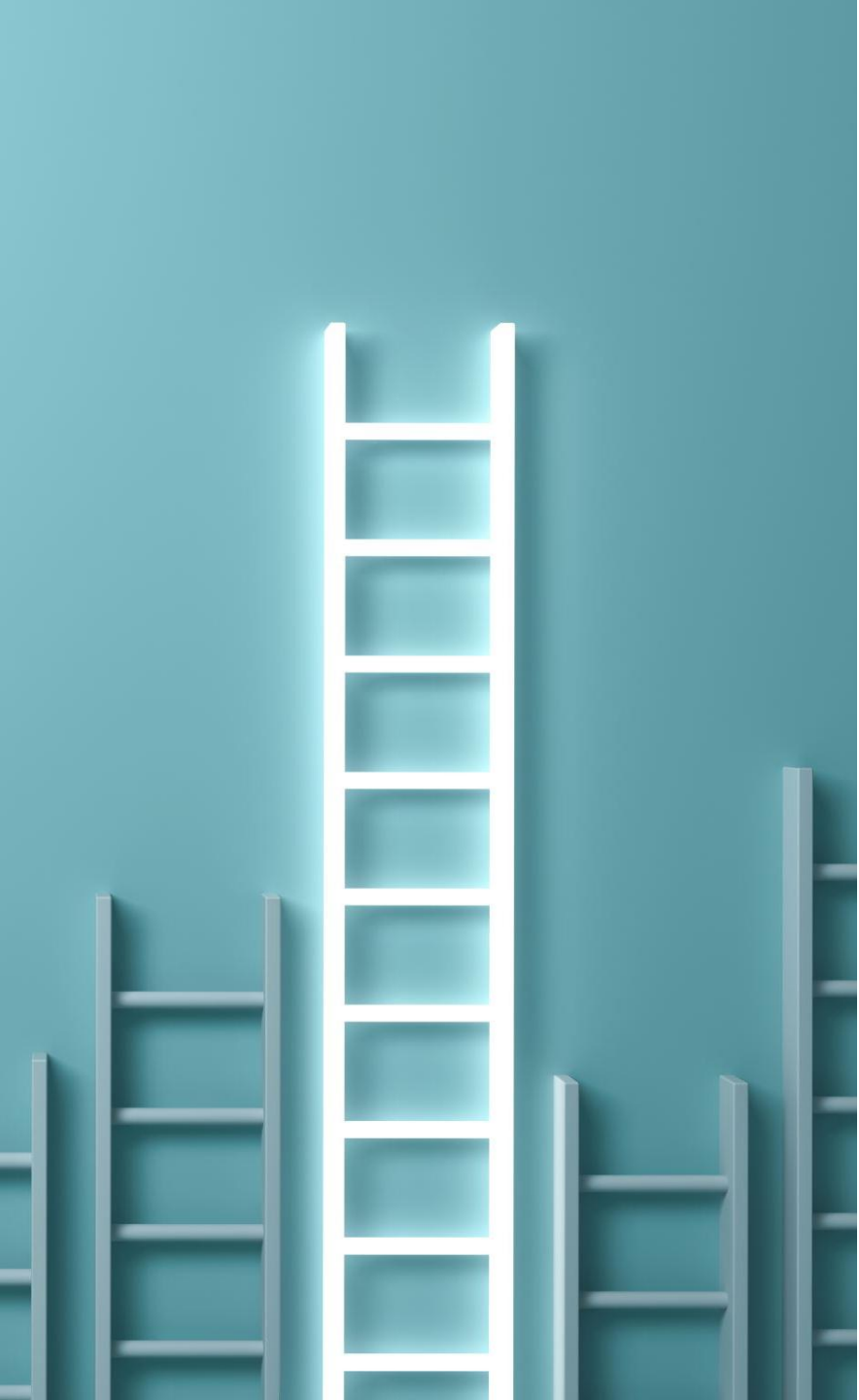
- Set aside rest/sleep time
- Set aside personal time
- Set aside exercise time
- Set aside family time
- Set your business schedule

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 26	Tuesday 27	Wednesday 28	Thursday 29	Friday 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			Door Knocking 11-12	Open - My time 11-12
12 PM	Lunch 12:30-1:30	Lunch 12:30-1:30	Coaching session with Mike 11:30-12:30	Lunch 12:30-1:30	Lunch 12:30-1:30
1 PM					
2 PM	Listing Appointments - Practice CMA - Practice RCA	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

Morning

Afternoon

Monday

Tuesday

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?

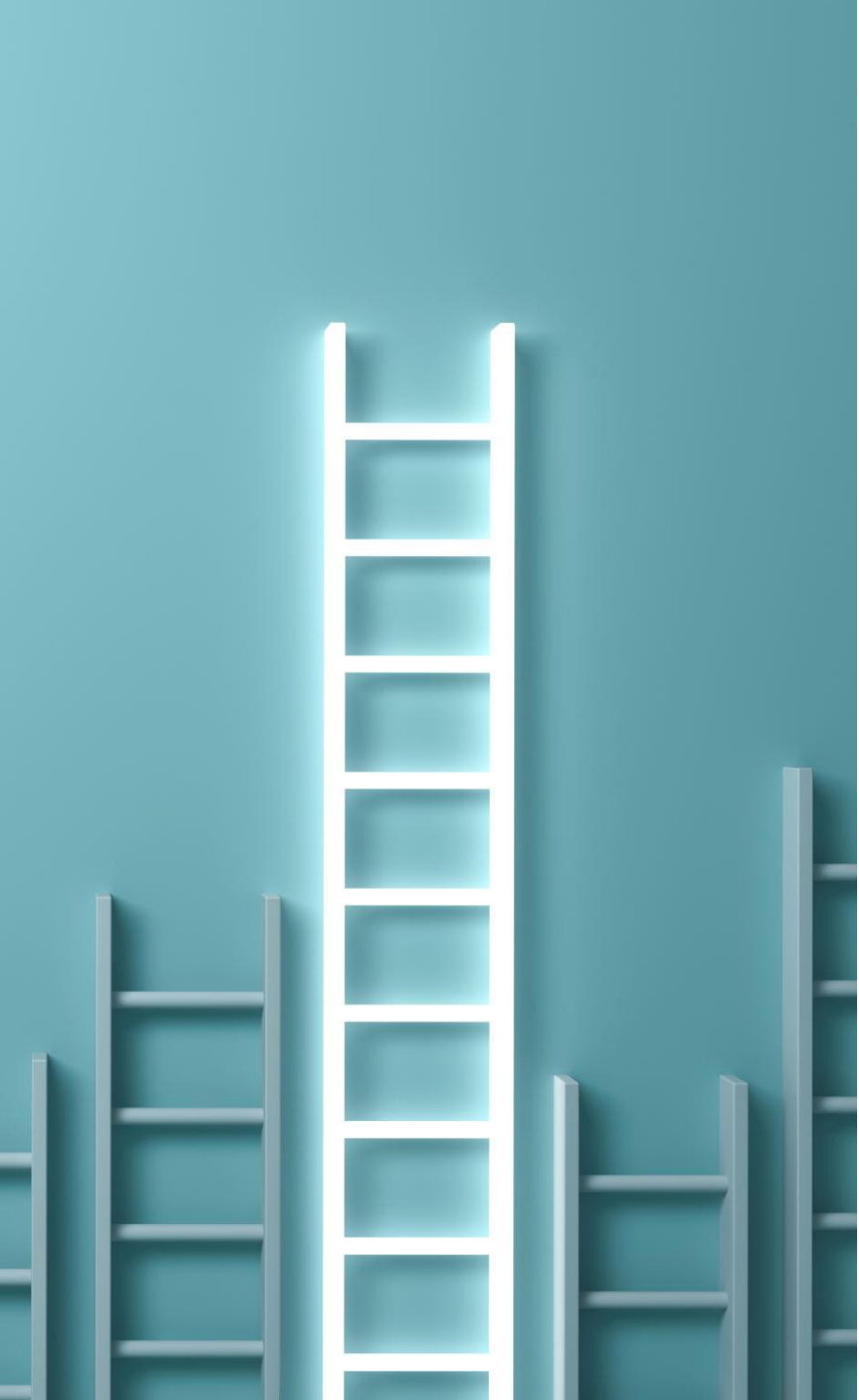
- ✓ SBDG
- ✓ Buyer Protection Guarantee
- ✓ Select Concierge
- ✓ Select Property Management



Select Group Business Planning – Part 2

My 2026
Plan



A decorative graphic on the left side of the slide features a teal background with several white ladders of varying heights. The ladders are arranged in a way that creates a sense of depth and perspective, with some ladders appearing to be in the foreground and others receding into the background.

Which of these human needs drives or motivates you

☐ **Stability**

☐ **Variety**

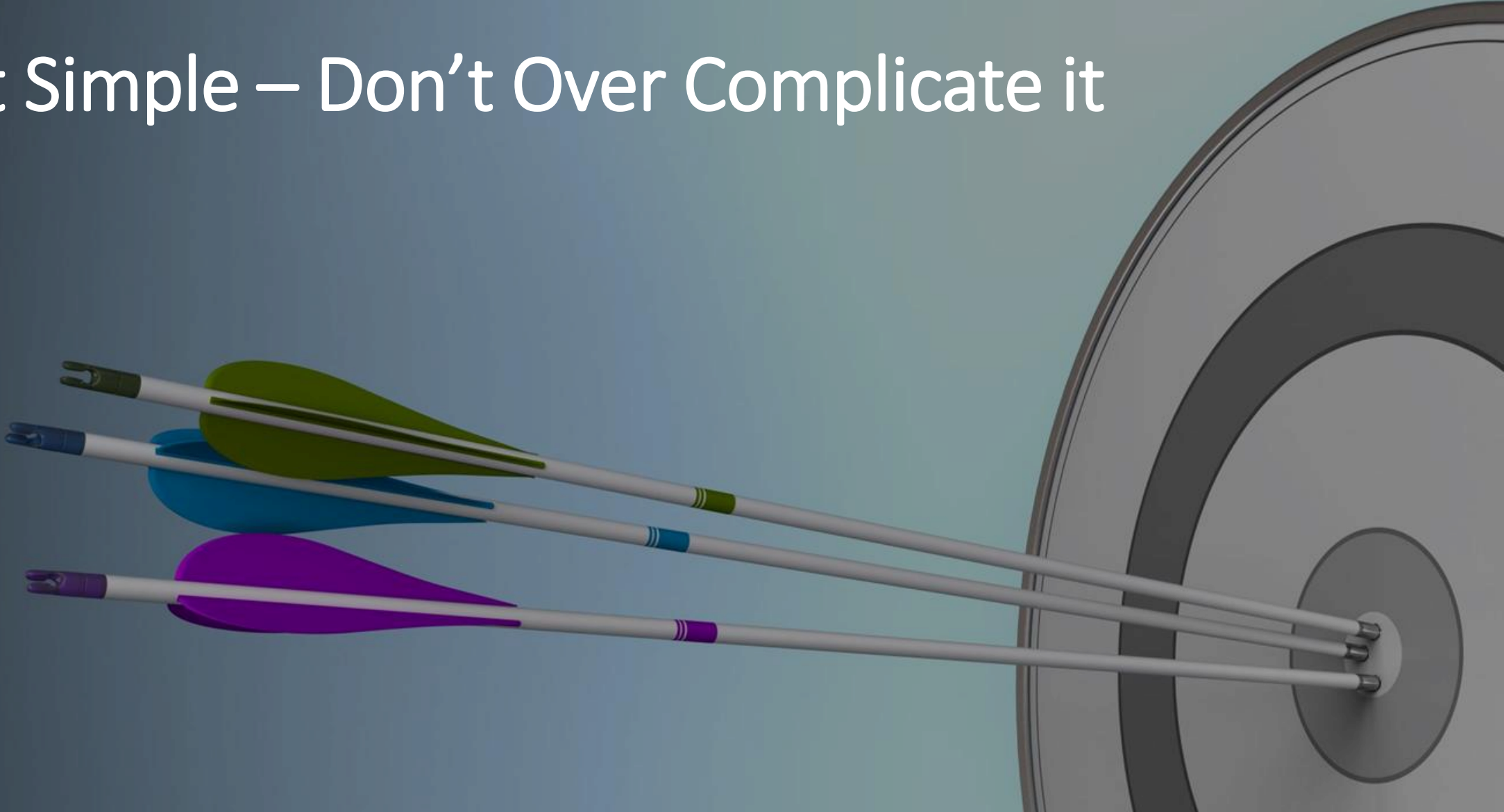
☐ **Significance**

☐ **Connection**

☐ **Growth**

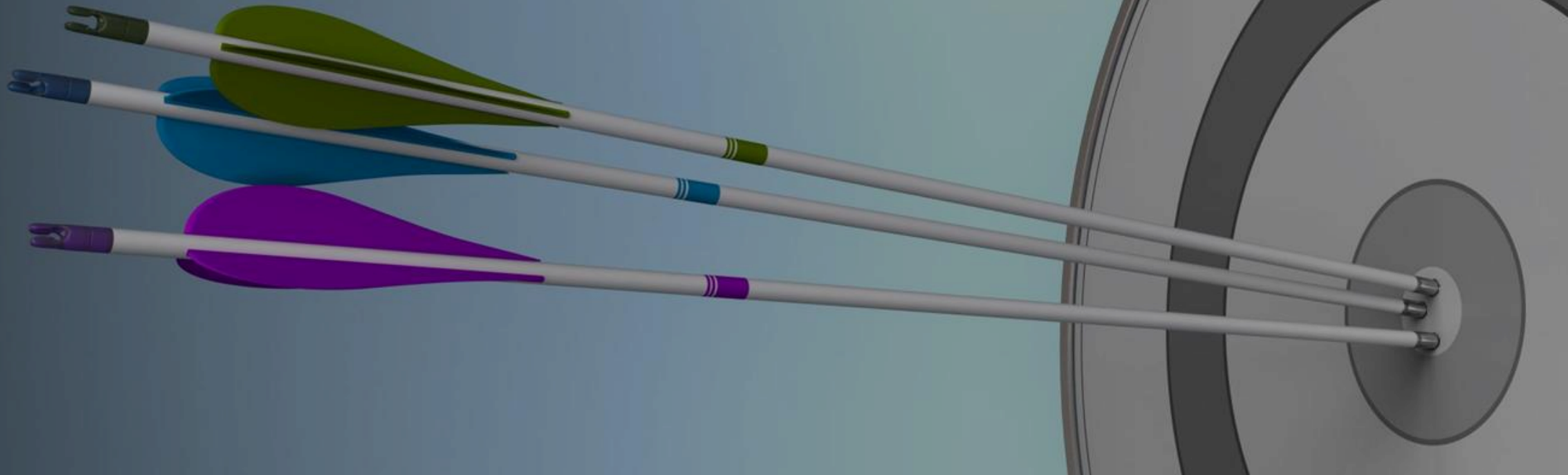
☐ **Contribution**

Keep it Simple – Don't Over Complicate it



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

- Family goals

- Personal health goals

- Business/Career goals



2026 Business/Career Goals

Not everything has to be about the money

Business/Career Goals

Example - I would like to get my Brokers license

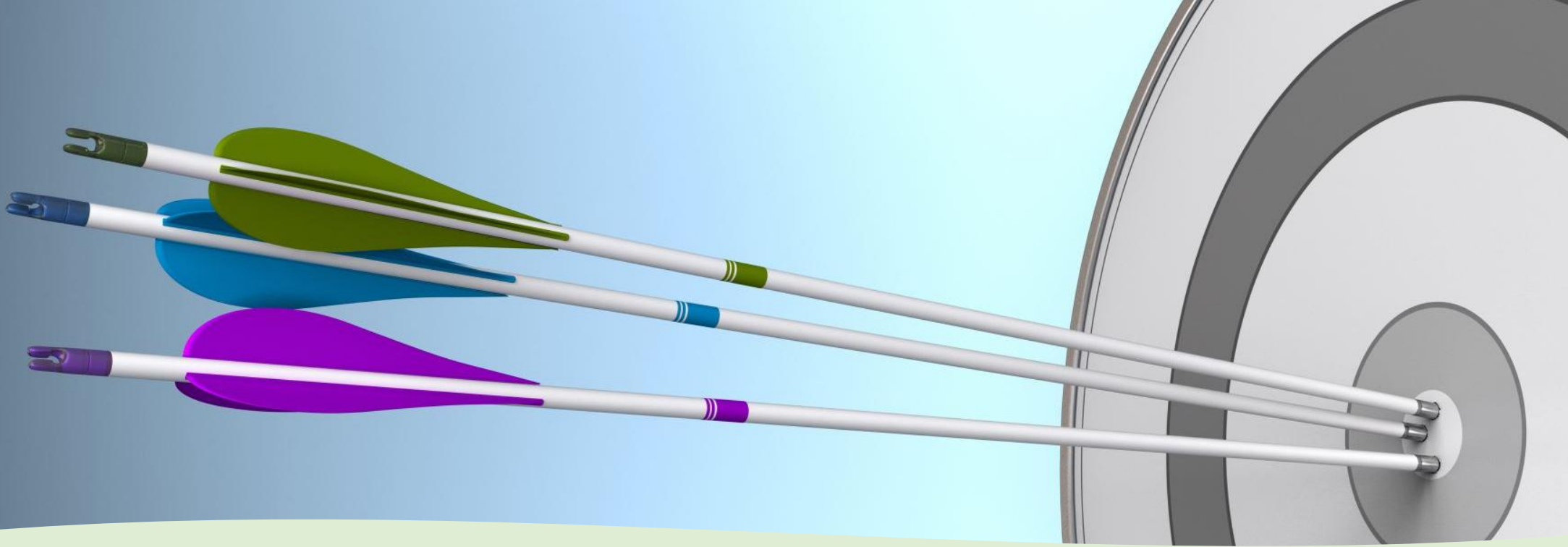


Let's Talk About Your Financial Goals





**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

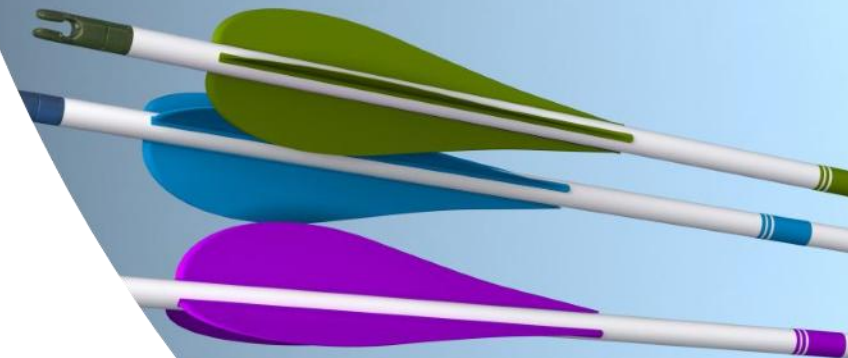
Average Price Point – \$500,000

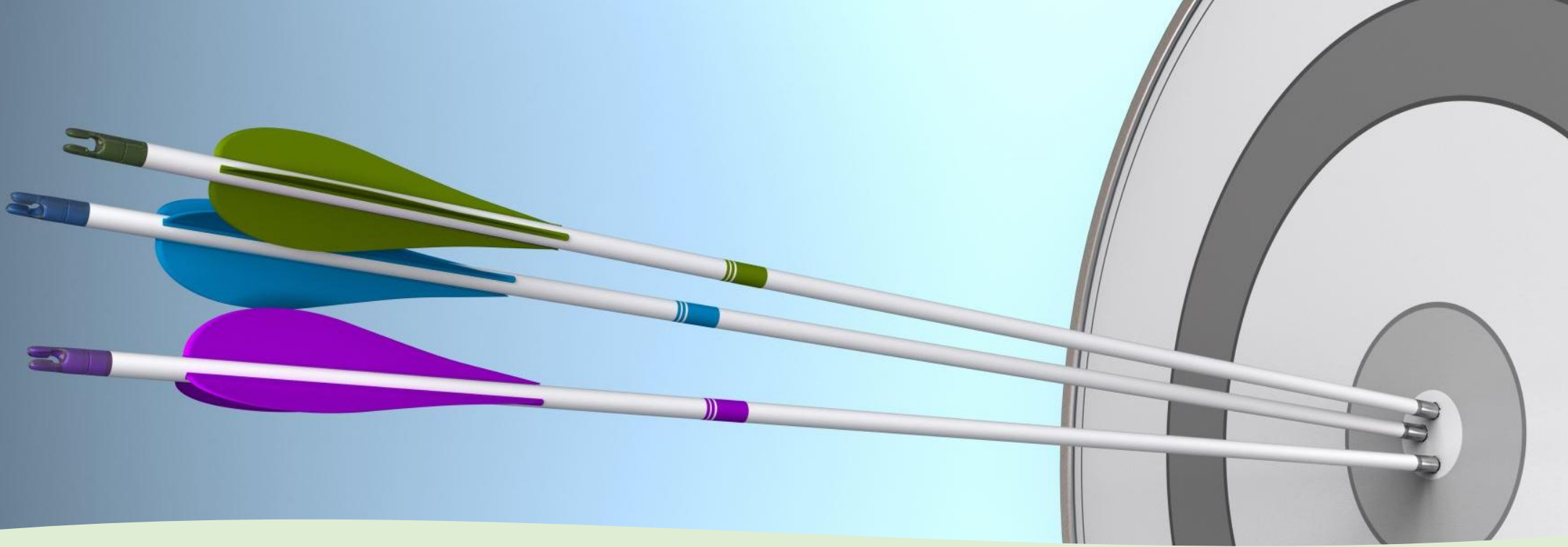
If your agent split is lower than 80% - the estimated closed units to reach this goal (using the same gross commission numbers listed above) remains at approximately 7 units when you factor in the company CAP (to 90%) program of \$12,500

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**





Don't Forget the Variables:

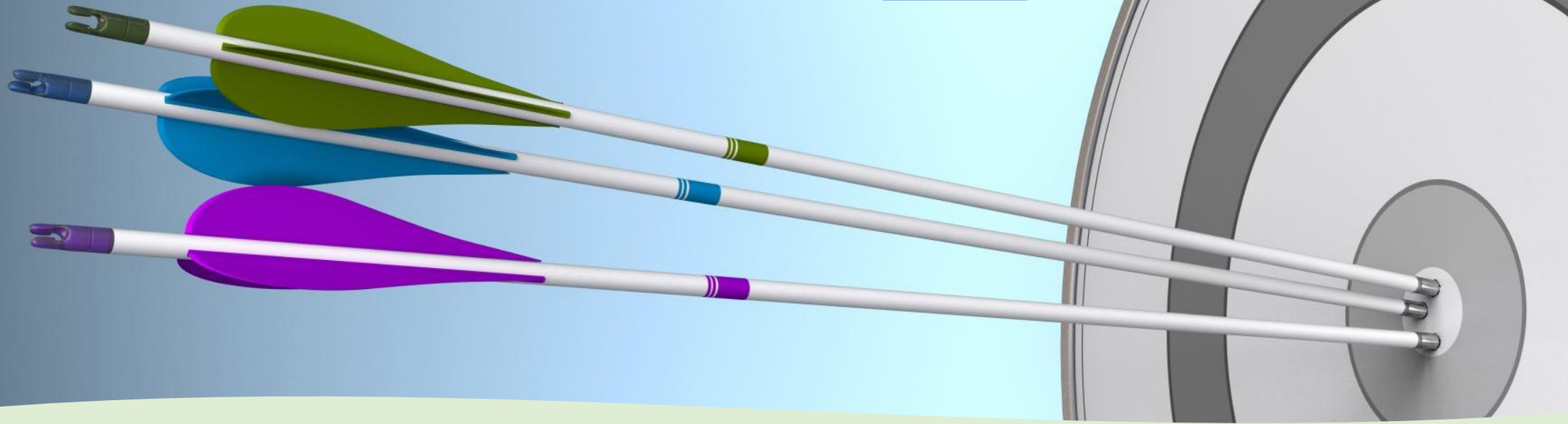
SBDG – Adjust/Allow for a lower net

Personal Lead Purchases – that's your cost

Inbound Referral cost – adjusts the gross income

Commission concessions

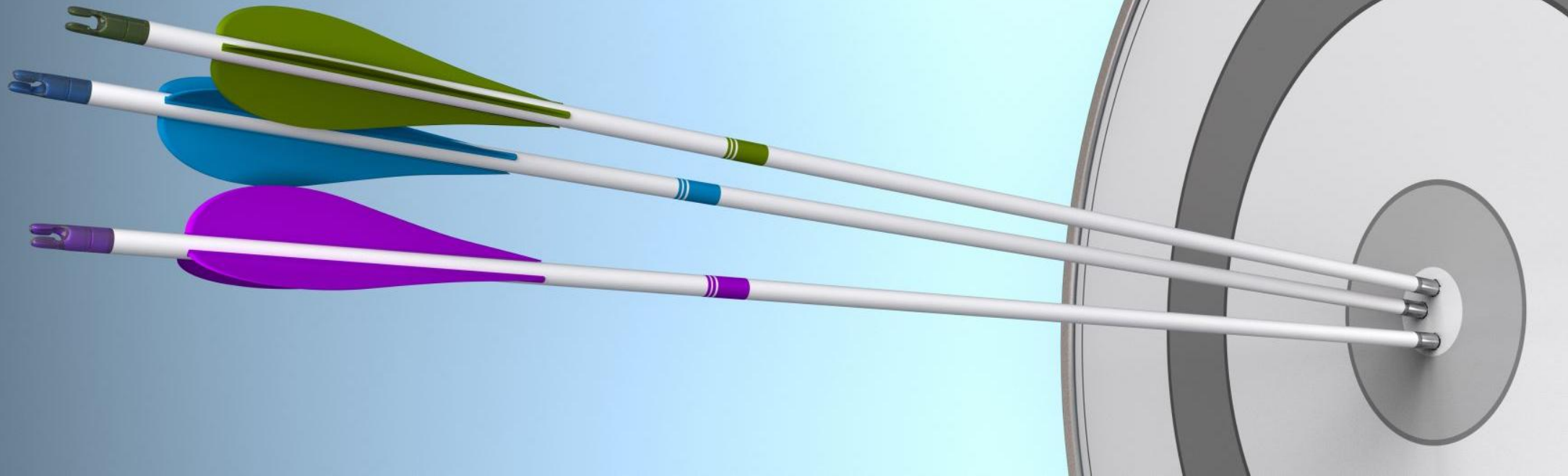
Know your number -



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!

- 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

	Monday 26	Tuesday 27	Wednesday 28	Thursday 29	Friday 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			Door Knocking 11-12	Open - My time 11-12
12 PM	Lunch 12:30-1:30	Lunch 12:30-1:30	Coaching session with Mike 11:30-12:30	Lunch 12:30-1:30	Lunch 12:30-1:30
1 PM					
2 PM	Listing Appointments - Practice CMA - Practice RCA	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

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

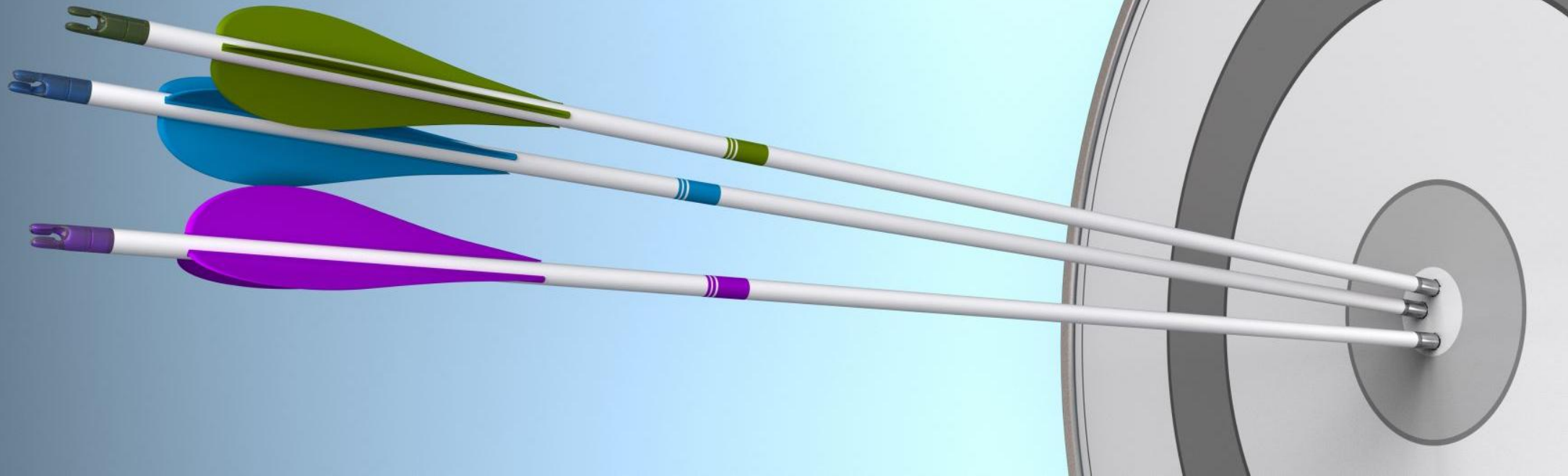


*Sometimes you
just need to think
outside the box*

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

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:

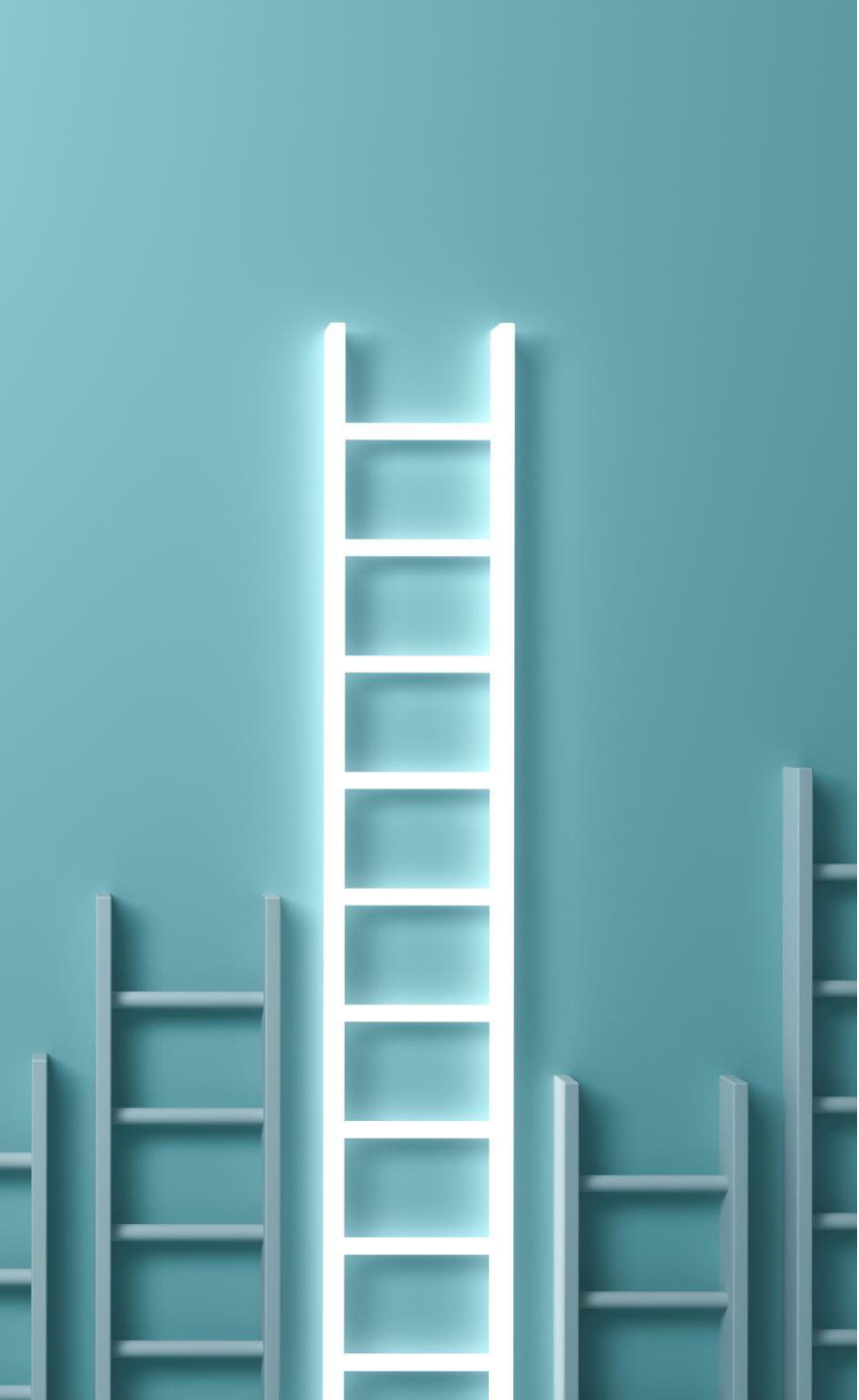
4. My priority for next week is:

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

6. I need additional instruction on:

7. Manager comments:

Attended my office meeting ____ Yes ____ No Met with my manager ____ Yes ____ No



Keep Track of Your Business Time

How did you spend it?

Day

Morning

Afternoon

Monday

Tuesday

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 you 2026 Plan

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

A Good Business
Plan looks for ways
to improve



Implementing
Missed Opportunities
helps to increase
your revenue

Things to consider regarding you 2026 Plan

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

A Good Business
Plan looks for ways
to improve



Improving the
quality of service
helps to increase
your revenue

Things to consider regarding you 2026 Plan

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

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

List your top 5 prospects for
1st quarter 2026

List your top 5 prospects for
2nd quarter 2026

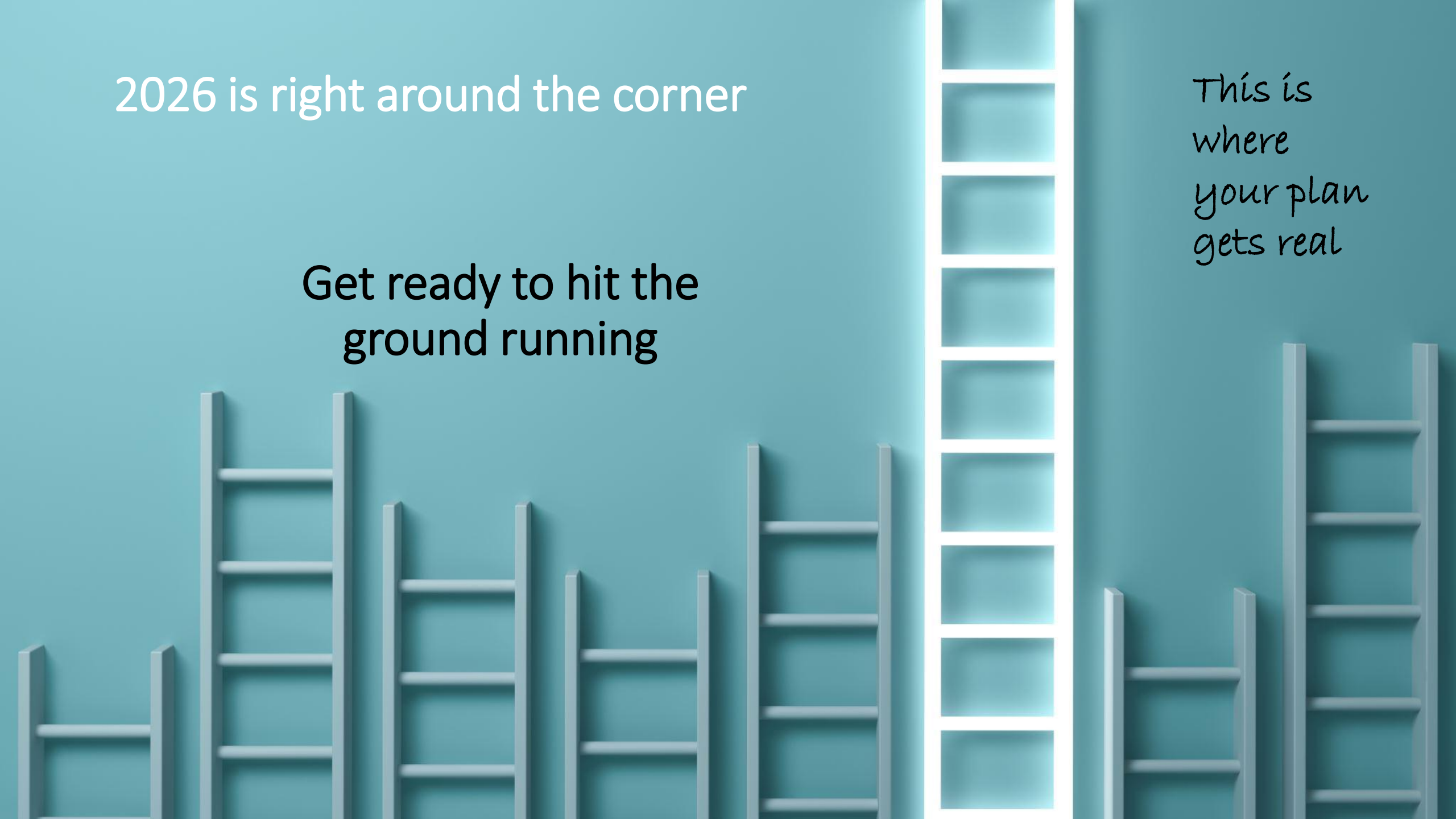
List your top 5 prospects for
3rd quarter 2026

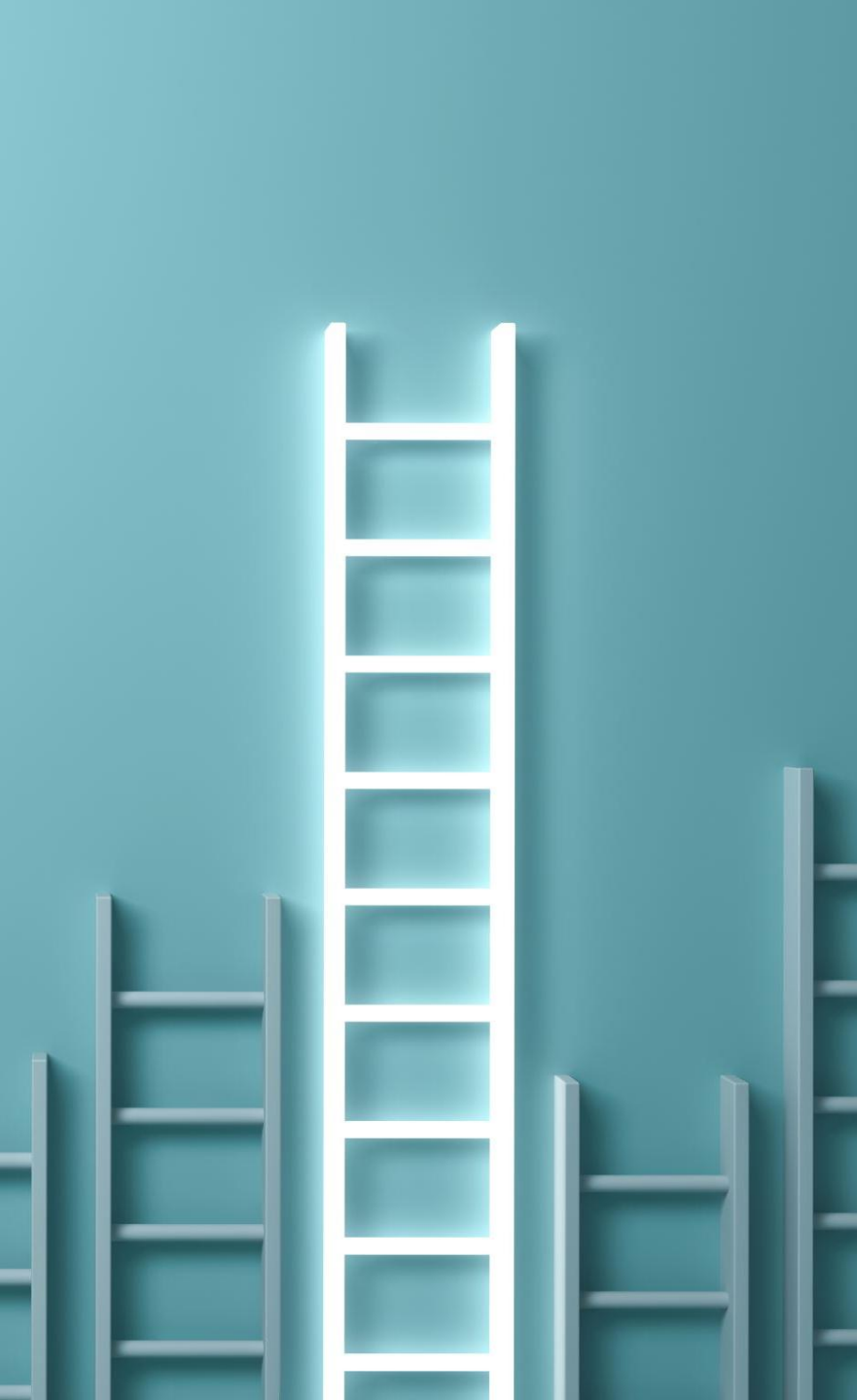
List your top 5 prospects for
4th quarter 2026

2026 is right around the corner

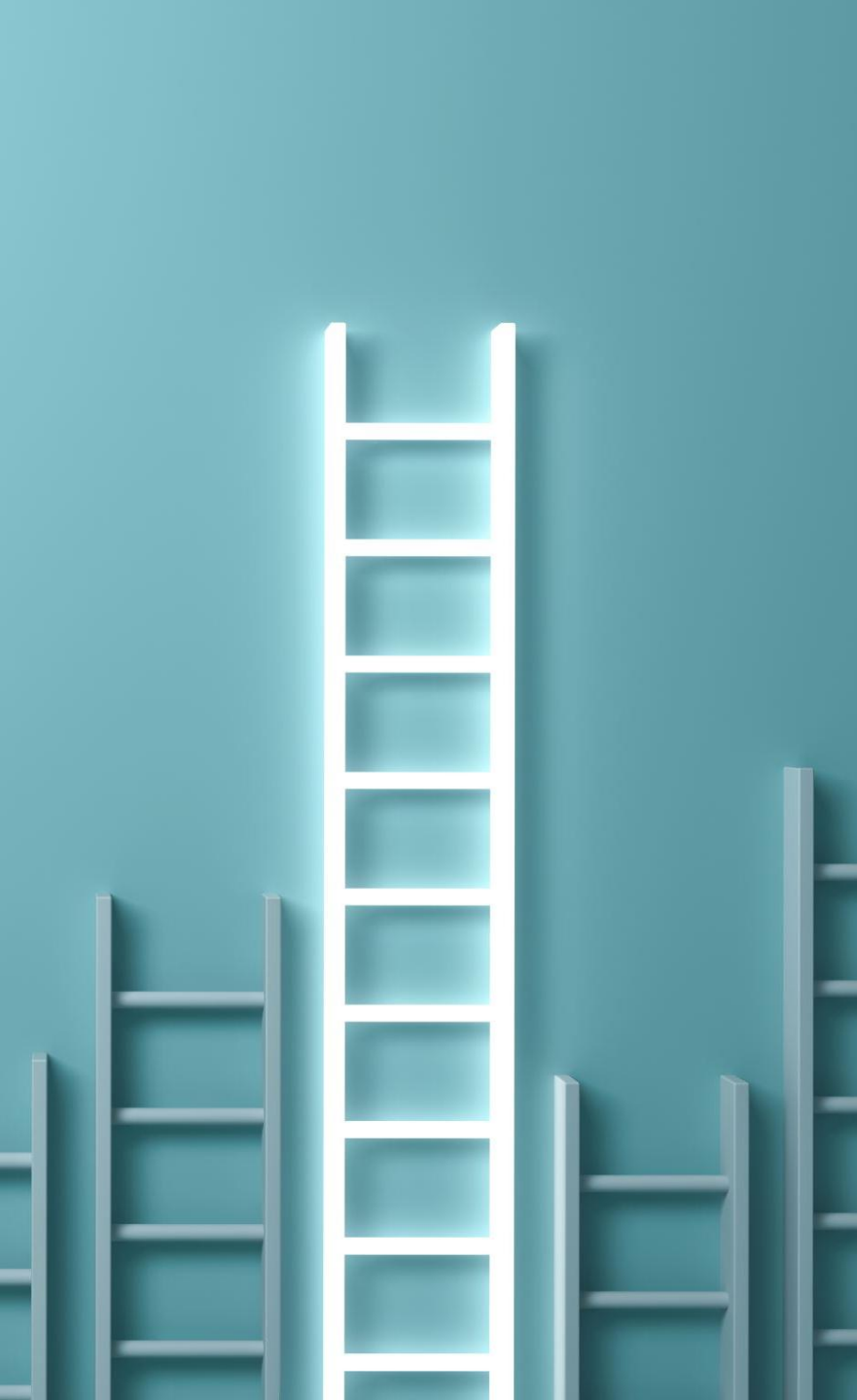
Get ready to hit the
ground running

This is
where
your plan
gets real





Miscellaneous Thoughts and Notes



Miscellaneous Thoughts and Notes



Miscellaneous Thoughts and Notes



Miscellaneous Thoughts and Notes
