

Business Planning

Success Series Perks

My Core Values

Select 10 Core value attributes from the list on the next slide and place them in the "Round 1" box. Select 5 attributes from "Round 1" and place in the "Round 2" box. Select 2-3 attributes from "Round 2" and place in your "Round 3" box. These are your final Core Values!

Round 1

Round 2

Round 3

Core Value Attributes

When choosing your values remember they should be values that already exist versus something you are aspiring to. They come naturally to you and they are things you will not negotiate or compromise on when doing business.

Accountability	Curiosity	Growth	Making a difference	Serenity	Competence	Learning
Achievement	Cooperation	Harmony	Nature	Service	Confidence	Legacy
Adaptability	Courage	Health	Openness	Simplicity	Connection	Freedom
Adventure	Creativity	Home	Optimism	Spirituality	Contentment	Friendship
Altruism	Curiosity	Honesty	Order	Sportsmanship	Contribution	Fun
Ambition	Dignity	Hope	Parenting	Stewardship	Cooperation	Future generations
Authenticity	Diversity	Humility	Patience	Success	Courage	Generosity
Balance	Environment	Humor	Patriotism	Teamwork	Creativity	Giving back
Beauty	Efficiency	Inclusion	Peace	Thrift	Responsibility	Grace
Being the best	Equality	Independence	Perseverance	Time	Risk-taking	Gratitude
Belonging	Ethics	Initiative	Personal fulfillment	Tradition	Safety	Vision
Career	Excellence	Integrity	Power	Travel	Security	Vulnerability
Caring	Fairness	Intuition	Pride	Trust	Self-discipline	Wealth
Collaboration	Faith	Job security	Recognition	Truth	Self-expression	Well-being
Commitment	Family	Joy	Reliability	Understanding	Self-respect	Wholeheartedness
Community	Financial stability	Justice	Resourcefulness	Uniqueness	Knowledge	Wisdom
Compassion	Forgiveness	Kindness	Respect	Usefulness	Leadership	Write Your Own
Leisure	Love	Loyalty				



My Mission

Your mission statement supports your vision. It serves to communicate your purpose and direction to your network and customers as well as the why behind it. Start by answering these 3 questions

Q. What does your business do? (In simple terms. what problem do you solve and how do you bring value)

A.

Q. How do you do it? (What products, services or value do you provide to solve the problem)

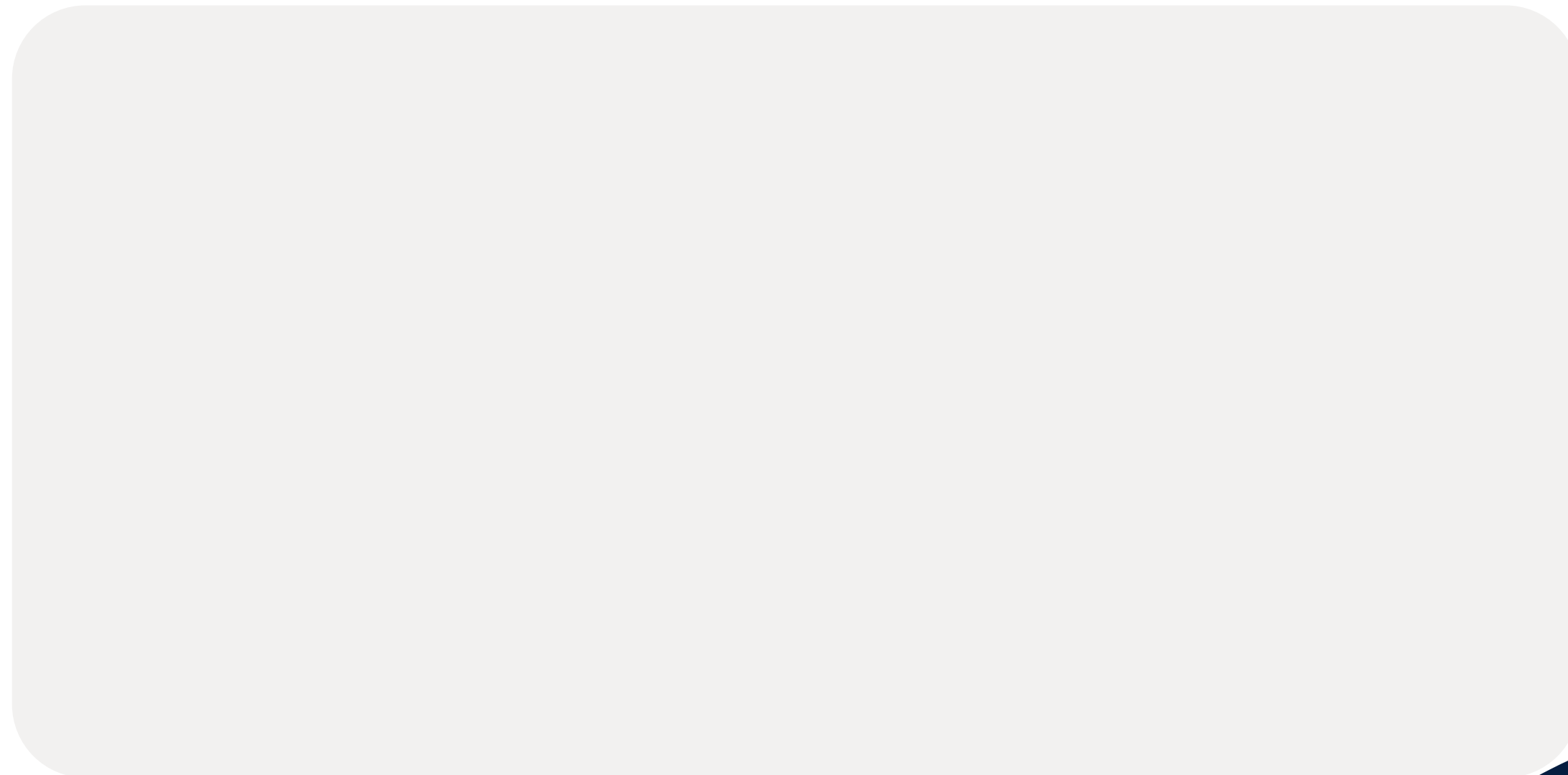
A.

Q. Capture your 'Why'. (Why did you start your business, What are you passionate about)

A.

My Mission

Now, take your 3 answers and combine them. Make your statement as concise as possible. Example: "We do X by doing Y in order to Z".



Map Your Business Model

Key Partnerships	Who is essential in helping you drive your business?	(Example: Local MLS, Office Depot, print shop)
Key Activities	What tasks are required for you to perform well?	(Example: Generating leads, open houses)
Key Tools	What tools are essential to operate your business?	(Example: Website, car, smartphone)
Value Proposition	Why should consumers choose you as their agent? What sets you apart?	
Key Customer Relationships	What methods do you use to maintain relationships with your customers?	(Example: Listing alerts, referral program, newsletter)
Key Business Channels	Account for all the ways in which you generate new business?	(Example: Website, referrals, advertising)
Key Customer Segments	What types of consumers do you provide the most value for? What niche do you want to focus on?	(Example: Retirees, families, military)
Cost Structure	Identify the yearly costs associated with each expense and list them in order of most expensive to least expensive. Add them up. This is the cost of operating your business.	(Example: Advertising = \$5,000 Car = \$3,000 Print shop = \$1,200 Total = \$9,200)
Revenue Stream	The number of transactions you generate each year from all your key business channels multiplied by the average home price in your area, multiplied by your commission rate. This is your revenue stream per channel. Add them together to get your Gross Commission Income.	(Example: Referrals = 2 x (\$200,000 x 3%) = \$12,000 Website = 4 x (\$200,000 x 3%) = \$24,000 Total GCI = \$36,000)



Understand Your Strengths & Weaknesses

	Marketing/Branding	Points
	When I do a web search for homes in my area, my website is easily found	10
	I send printed mailers to my targeted areas and neighborhoods	5
	I write at least one real estate social post per day	5
	I post YouTube videos to promote my expertise and knowledge of the local area	5
	I connect with prospects and clients on Facebook or other social media channels (LinkedIn, Instagram)	10
	I participate in local events, community associations, and organizations	15
	In all my marketing, I make sure to channel responders back to my website	10
	TOTAL	



	Lead Generation	Points
	I generate at least one referral each month	2
	I receive three or more referrals each month	5
	My website generates leads consistently each month	15
	My broker provides me with leads	5
	I generate leads from online sources (i.e. Social)	10
	I receive leads from third-party providers (i.e. Homes.com, Zillow, Realtor.com)	10
	I use print marketing to generate new leads	3
	I use search engine advertising (Google, etc.) to drive consumers to my website	5
	With all my lead gen activities, I add between one and 10 leads to my pipeline each month	10
	With all my lead gen activities, I add between 11 and 20 leads to my pipeline each month	15
	With all my lead gen activities, I add between 21 and 30 leads to my pipeline each month	15

Total



Understand Your Strengths & Weaknesses

	Referrals	Points
	I make a concerted effort to meet new people and grow my sphere of influence	10
	I use automated emails to stay in touch with clients	5
	I send gentle reminders to clients informing them of changes in their home's value	5
	I connect with and engage clients on social media	5
	I send my clients polite requests for referrals	10
	I add all my clients to a newsletter delivered at least once per month	15
	I ask all my clients to write a review of my services	10
	I focus on providing relevant content to my clients after the transaction	15
	TOTAL	



	Lead Engagement	Points
	I respond to new leads within one hour of receiving their contact information	10
	I make sure all my leads are signed up for property alerts	5
	I provide relevant and helpful information to my active leads and clients regularly	5
	I send at least one communication per month to my expired leads and clients	5
	I make sure consumers come back my website for listings, neighborhood data, and other helpful resources	10
	I keep all my leads and contacts in one contact management system (kvCORE)	15
	I access all my leads and marketing tools from my Smartphone as well	10
	I know when leads are utilizing my website and what they are looking at	10
	I automate communications with leads and clients	10
	I track how many new leads enter my pipeline	10
	I drive all lead generation channels through my website	10

Total



Understand Your Strengths & Weaknesses

Final Score	Points
<p>Marketing/Branding - Successful Agent Score = 30+ How can you sell more homes if consumers can't find you? When they do find you, how do they know that you're the best choice for them? Marketing and branding are essential, not only for generating leads, but also for making sure leads choose you and not the agent next door.</p>	
<p>Lead Generation - Successful Agent Score = 50+ Top agents make lead generation a primary focus in their daily business activities. They know that maintaining a consistent flow of leads entering their pipeline is the only way to generate more sales and future referrals.</p>	
<p>Referrals - Successful Agent Score = 25+ Your odds of closing a deal with a referral are much greater than your standard lead, but referrals are notoriously hard to generate. Make it easier on yourself by always being dedicated to meeting new people, maintaining and growing your social networks, and promoting your individual brand.</p>	
<p>Lead Engagement - Successful Agent Score = 60+ There's no point in generating leads if you don't have a strategy to engage those leads once you've made initial contact. More than any other strategy, today's top agents are using technology to help them engage their leads quickly and effectively.</p>	



Find Your Focus Areas

Focus Area	Change Needed
Lead Generation	
Lead Engagement	
Marketing and Branding	
Referrals	