

BUSINESS PLANNING

BWB/VANGUARD ADVANTAGE



VANGUARD REALTY

SALES ASSOCIATE: _____

OFFICE: _____

BROKER/MANAGER: _____

PURPOSE

SUPPORTING YOUR SUCCESS EVERY DAY!

MISSION STATEMENT

WE WILL BE RECOGNIZED AS THE MOST PROFESSIONAL AND INNOVATIVE REAL ESTATE ORGANIZATION IN THE MARKET.

VISION

FOSTER EXCELLENCE IN REAL ESTATE THROUGH CAREER ENHANCEMENT PROGRAMS AND TOOLS FOR OUR CUSTOMERS AND EMPLOYEES.



VANGUARD REALTY

CORE VALUES

- Be professional at all times
- Provide exceptional service with a smile
- Make it easy to buy and sell real estate
- Serve, be involved in our community
- Work hard, but have fun

SUCCESS RULES

"LET'S TAKE THE DIP!"

1. **Dedication:** "You have to show up!"
2. **Intensity:** "You get out what you put in!"
3. **Patience / Commitment:** "You've got to commit long term!"

BUSINESS PLANNING AGENDA

PHASE I

1. Self Analysis (Success Pyramid)
 - » Personality Survey Review
 - » Personal Internal Analysis
 - » Business Rating
 - » Time Management
 - » Time Blocking
2. Vision & Mission
 - » Review Company Vision
 - » Commitment
 - » Personal Vision
 - » Professional Vision
3. Prior Year Review
 - » Closed sales
 - » New listings
 - » Listing Side / Buyer Sides ratio
 - » Income
4. This Year's Goals
 - » Income
 - » Volume / Units

PHASE II

5. Plans
 - » Types of Prospecting
 - » Prospecting Plan & Strategies
 - » Target Markets
 - » Marketing Budget
 - » Business Expenses
6. Accountability
 - » Daily Goal Sheet
 - » Monthly "To Do's"
 - » Progress Chart
7. Coaching
 - » Weekly
 - » Monthly
 - » Quarterly
8. Charitable Efforts / CBV Cares

SUCCESS PYRAMID

SKILL

KNOWLEDGE

ATTITUDE

Take The Test Now At
- CAREERQUESTNOW.COM -

PERSONAL INTERNAL ANALYSIS

1. Barriers that kept you from achieving your goals?

Solutions: _____

2. Personal Challenges?

Solutions: _____

3. Business Challenges?

Solutions: _____

4. Why Real Estate?

a. _____

b. _____

c. _____

5. What can I do today to set myself up for success next year?

Life Priorities

1 _____

2 _____

3 _____

4 _____

5 _____

BUSINESS RATING/SURVEY

Rate yourself from "1" (needs improvement) to "5" (excellent) with the following statements:

0-N/A 1 2 3 4 5
(Needs Improvement) (Excellent)

1. Prospecting

- » I prospect on a weekly basis. _____
- » I have a for-sale-by-owner (FSBO) presentation I use on a regular basis. _____
- » I have a listing presentation I use on a regular basis. _____
- » I follow up more than three items to FSBOs and expired listing customers. _____
- » I have a lead-generation program set up for Internet leads. _____

Total Score _____

2. Sphere of Influence

- » I have a database of people I know (SOI) set up in my computer. _____
- » I contact my SOI on a monthly basis. _____
- » I have detailed information (birthdays, anniversaries, etc.) about my SOI. _____
- » I ask my SOI for referrals on a regular basis. _____
- » I have more than 100 names in my SOI. _____

Total Score _____

3. Time Management

- » I keep a daily log of my appointments and tasks I am to complete each day. _____
- » I block out a time each day to prospect new business. _____
- » I block out a time each day to follow up on my real estate leads. _____
- » I review my day each evening to determine my productivity. _____
- » I plan my day out each morning, setting goals and tasks to be completed. _____

Total Score _____

4. New Technology Trends

- » I have a blog and utilize it on a regular basis. _____
- » I read and currently subscribe to other blogs. _____
- » I have a mobile phone that I can use to track appointments, tasks, etc. _____
- » I have a Facebook, Twitter, Linked In account that I use for my real estate business. _____
- » I know how to post my profile to Realtor.com. _____
- » I know how to post my profile to CB.com. _____
- » I know how to post my profile to CBV.com. _____
- » I know how to post my profile to Trulia.com. _____
- » I know how to post my profile to Zillow.com. _____
- » I use a CRM. _____
- » I use transaction management. _____

Total Score **_____**

5. Planning

- » I have a written business plan for my real estate business. _____
- » I have a written marketing plan for my real estate business. _____
- » I have a buyers' presentation prepared and ready to use. _____
- » I know what my average sales price is, days on market, list-to-sales-price ratio, and other important statistics about my productivity. _____
- » I have written goals for my business and personal life that I review daily. _____

Total Score **_____**

TIME MANAGEMENT & TIME BLOCKING

WHAT IS TIME MANAGEMENT?

The ability to use one's time effectively and productively. - Webster

The act or process of planning and exercising conscious control over time. - Wikipedia

The ability to plan and control how you spend the hours in your day to effectively accomplish your goals. - Psychology Today

Before you start every work week you should have a list of tasks that you intend to accomplish during the week. This list should include prospecting, marketing, appointments and personal time and responsibilities. The list is then transferred onto the "Weekly Success Report". The better job you do of following your schedule, the sooner you will learn to juggle the different responsibilities that you have and still develop a successful real estate career.

WHAT IS TIME BLOCKING?

The first thing that you must decide is when you are going to lay out your schedule for the upcoming week. There should be a set time every week when you do this and this time should be placed on your schedule every week. Sunday is a good time when planning for the upcoming week. Reserve about 30 minutes to an hour to make your list, review your list and then allot times.

Time Blocking is a key tool to Time Management. It is a strategy for using time wisely and achieving greater productivity and planning.

PURPOSE OF TIME BLOCKING:

- Focus on one task at a time
- Achieve Goals
- Limit distractions
- Productive Prospecting

STRATEGIES FOR TIME BLOCKING:

- Identify HIGH priority tasks and projects
- Block out time for specific tasks
- Use a visual tool to block out time
- Schedule breaks
- Find a quiet work space
- Limit distractions

MISSION, VISION, GOALS

What makes you and your business different? _____

What are some words that describe you? _____

While a Mission Statement describes what a business wants to do now, a Vision Statement outlines what a business wants to be in the future.

The Mission Statement concentrates on the present; it defines the customer(s), critical processes and it informs you about the desired level of performance.

The Vision Statement focuses on the future; it is a source of inspiration and motivation. Often it describes not just the future of the business but the future of the industry or society in which the business hopes to effect change.

Professional Mission: _____

Professional Vision: _____

Top 5 Personal Goals

1. _____
2. _____
3. _____
4. _____
5. _____

Top 5 Professional Goals

1. _____
2. _____
3. _____
4. _____
5. _____

MY BUSINESS GOALS FOR THIS QUARTER

1. _____

2. _____

3. _____

4. _____

5. _____

MY PERSONAL GOALS FOR THIS QUARTER

1. _____

2. _____

3. _____

4. _____

5. _____

PRIOR YEAR REVIEW

YEAR >

Total Sales Volume	
Total Sides Sold	
Listing Sides Closed Volume	
Listing Sides Closed Units	
Buyer Sides Closed Volume	
Buyer Sides Closed Units	
Listing Side Closed %	
Buyer Side Closed %	

Listing Sides

Leads	
Listing Appointment Opportunities	
Listing Appointments Secured	
% of Listing Appts Secured	
Listings Taken	
% of Listing Appts to Listings Taken	
AVG Listing Price	
AVG Listing Sold Price	
LP/SP Ratio	
AVG DOM	

Buyer Sides

Leads	
Ready Willing and Able Worked With	
% Worked With to Leads	
Under Contract	
% UC to Worked With	
Sold	
% Sold to UC	








Company Generated Business

Listing Leads	
Buyer Leads	
Total Leads	
Listings Sold	
Buyers Sold	
Total Unit Sales	
Listing Leads Conversion Rate	
Buyer Leads Conversion Rate	
Overall Conversion Rate	
Total Volume Sold	
OGRs Sent	
OGRs Closed	
USAA AGRs Turned In	
Navy Federal AGRs Turned In	
Other AGRs Turned In	
Total AGRs Turned In	
USAA AGRs Closed	
Navy Federal AGRs Closed	
Other AGRs Closed	
Referrals Income \$	

Marketing Expenses	
Other Business Expenses	
Total Business Expenses	
Personal 1099 Income	

THIS YEAR'S GOALS

INCOME GOALS




1 Net Income	
2 Marketing Budget \$	
3 Net Income Before Expenses (NIBE)	
Agent Net After Company \$	
Paid to Company	
Threshold / Adjusted Gross Commission Income (AGCI)	
Agent Net After Company \$	
Paid to Company	
AGCI After Threshold	
4 Total Adjusted Gross Commission Income (AGCI)	
Total AGCI Referral Fees Paid on Referral Fees	
Gross Commission Income Referral Fees Paid on	
Total AGCI Referral Fees Not Paid on	
5 Total Gross Commission Income (GCI)	

PRODUCTION GOALS





GCI per Transaction
AGCI per Transaction
AVG Sale Price

Total Volume	
Total Units	

RATIOS

Current Listing Side Closed Sales %	
Goal for Listing Side Closed Sales %	 50%
Current Buyer Side Closed Sales %	
Goal for Buyer Side Closed Sales %	 50%
Current Listings Taken to Sold %	
Goal for Listings Taken to Sold %	 75%
Current Listing Appointments to Listings Taken	
Goal for Listings Appointments to Listings Taken	 75%

PRODUCTION GOALS DETAIL

Listing Sides Volume	
Listings Sold	
Listings Taken	
Listing Appointments	
Buyer Sides Volume	
Buyers Sold	
Buyers Under Contract	
Ready Willing and Able Buyers to Work With	
Buyer Leads	
Listing Appointments per month	
Listing Appointments per week	
New Buyer Leads per month	
New Buyer Leads per week	

TARGET MARKETS

Geographical Area(s):

1. _____
2. _____
3. _____
4. _____
5. _____

Neighborhood(s):

1. _____
2. _____
3. _____
4. _____
5. _____

Network(s):

1. _____
2. _____
3. _____
4. _____
5. _____

Marketing >

	PRODUCT	NUMBER	DURATION	BUDGET
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____
5.	_____	_____	_____	_____
6.	_____	_____	_____	_____
7.	_____	_____	_____	_____
8.	_____	_____	_____	_____
9.	_____	_____	_____	_____
10.	_____	_____	_____	_____

SOURCES IN YOUR PROSPECTING PLAN

When laying out your schedule for the week, there are some times that work better than others for specific activities and prospecting.

PROSPECTING STRATEGIES	TIME BLOCKING
Open Houses	Saturday or Sunday Consider a Twilight Open House on a weeknight Time governed by location and Seller Consider Marketing time
For Sale By Owner (FSBO)	Sunday Afternoon Monday Morning/Evening When You See the Sign Go Up
Market Area/Geographic Targeting	Contact Each at least once per month Phone call or In-Person Schedule ten (10) to twenty (20) per week
Sphere of Influence	Contact Each at least once per month Phone call or In-Person Schedule ten (10) to twenty (20) per week
Cancelled or Expired Listings	Monday Morning Tuesday Morning



OPEN HOUSE



FSBO



MARKET AREA



SPHERE



EXPIREDS

PROSPECTING PLAN

Using the listing below, write down the percentage of income the activity would comprise, and the actual income you would receive. (For example, if your Personal Income Commitment is \$100,000 and you feel that you will receive 10 percent of your income through FSBO prospecting, your actual income from these calls would be \$10,000.)

<u>PROSPECTING ACTIVITY</u>	<u>PERCENTAGE OF INCOME</u>	<u>ACTUAL INCOME</u>
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____
6. _____	_____	_____
7. _____	_____	_____
8. _____	_____	_____
9. _____	_____	_____
10. _____	_____	_____
TOTAL	100%	\$ _____ (Personal Income Commitment)

PROSPECTING PLAN STRATEGIES

How can you use the above items to achieve your prospecting objectives? Visit the vNet Marketing Center for a complete overview of the systems and tools available to you.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

SYSTEM AND MONTHLY "DO" PLANS FOR GROWTH

JANUARY	FEBRUARY	MARCH
APRIL	MAY	JUNE
JULY	AUGUST	SEPTEMBER
OCTOBER	NOVEMBER	DECEMBER

MARKETING BUDGET

	C U R
Target Markets to Generate Business	%
Past customers/clients	
Prior Profession	
Sphere of Influence	
Geographical Farm	
Expired Listings	
FSBO's	
Other	
Other	
Other	
Listing Costs (cost per listing x # of listings)	
Signs/name signs	
Display boxes	
Flyers/Brochures	
Photography	
Print Advertising	
Mailings	
Seller Gifts	
Others	
Others -- Total per listing x (number of listings)	
Other Promotions	
Gifts	
Entertainment	
Personal Marketing	
Photos	
Brochures	
Graphics	
Printing	
Other	
Business Cards	
Sponsorships	
Community Services	
Internet Leads - Zillow-	
Total Marketing Expenses	
Total Marketing Expenses as a % of Income	
(Total Marketing Expense / Gross Income	

CONCIERGE SERVICES

Market Maker Campaigns

Street Address	Date	Price	Sq. Ft	\$/Sq. Ft	Year
8988 Lake Kathryn Dr	05/02/2014	\$665,000	3,600	\$185	1994
180 Sea Island Dr	07/13/2014	\$655,000	3,410	\$192	1994
192 Sea Island Dr	06/28/2014	\$600,000	3,274	\$183	1993
2604 Long Boat Ct N	06/01/2014	\$560,000	2,600	\$215	1990
28 Village Walk	06/13/2014	\$512,500	2,560	\$200	1981
11 Spy Glass Ln	06/22/2014	\$455,000	2,660	\$171	1986
36 Walkers Ridge	05/31/2014	\$330,000	2,040	\$162	1990
35 Walkers Ridge Dr	05/11/2014	\$302,000	1,920	\$157	1995
121 Willow Pond	07/10/2014	\$216,000	1,502	\$144	1985
11 Northgate	06/08/2014	\$178,000	1,713	\$104	1984

Door Hangers

Note Pads

Customer Contact Management -- 4 mailings, one low price

Initial Buyer Contact Package

After Closing Letter Package

Homestead Deed Letter Package

HUD-1 Letter Package

Listing Builder Just Listed 3 mailings

Track A

Kate Miller, REALTOR®
904.334.7426
kate@vanguardrealty.com
7563 Philips Hwy., Suite 203
Jacksonville, FL 32256

3 people are invested in the sale of 108 Putters Way. The Seller, the Agent and You.

Everyone wants this home to sell for the best possible price. We take care about our community! You want your neighborhood like you care about this neighborhood like you do.

If you know someone looking to buy in this neighborhood, give me a call. If you are thinking of selling your home, I would love to compete for your business. Services you can count on.

904-334-7426

Just Listed



108 Putters Way

Working to protect home values while producing the results my customers have come to expect.

Kate Miller

108 Putters Way Available for Showings 24/7

We are a global economy, which means reaching out to buyers whether they are local, across the country or around the globe. That is why my customers choose to list and sell their homes with me, *Kate Miller*, at Coldwell Banker Vanguard Realty.

Within the first week of listing this home I provided:

- Professional photography showing the home's very best features
- Distribution to 100's of websites
- Enhanced Placement on top Real Estate web searches
- YouTube video created and posted
- Mobile device formatted.

More than 50% of internet searches happen on a mobile device.

When a buyer looks at your home it's showing. The first one is online. My guarantee is great impression. If someone who may be interested in it or you are interested in selling yours, contact me.

Working to protect home values while producing the results my customers have come to expect.

Call me today! 904-334-7426

Track A

COLDWELL BANKER VANGUARD REALTY

Dear Homeowner,

If you are thinking about selling your home, there are several things to consider before putting it on the market.

- How much lead time do you need before closing on your home after it is sold?
- What price range do you think the home is in today, and at what price do you expect it to sell?
- What steps do you need to take to get the best possible price?
- What closing costs does a seller normally pay and how will this affect the sales price and the amount you receive when the sale is complete?
- What makes a good real estate agent and what is important to you when working with an agent?

By thinking about these things in advance, you can save both time and money. As a professional REALTOR® deeply familiar with this market, I can answer these and any other questions you may have. I am happy to meet with you to discuss your questions at no charge and without any obligation.

If you have your home in today's local market, please call, text or

Kate Miller

7563 Philips Hwy., Suite 203
Jacksonville, FL 32256
www.CBM.KateMiller.com

JOE SMITH
1234 MAIN STREET NORTH
JACKSONVILLE, FLORIDA 32205

Listing Builder Just Sold 2 mailings

Track C

Kate Miller, REALTOR®
904.334.7426
kate@vanguardrealty.com
7563 Philips Hwy., Suite 203
Jacksonville, FL 32256

I've just sold your neighbor's home. You ready to sell? With my experience and knowledge of the neighborhood, your home can sell quickly at a price it DESERVES! Work with a professional who can make the process smooth and stress-free. I look forward to hearing from you!

904-334-7426

JUST SOLD



108 Putters Way

Working to protect home values while producing the results my customers have come to expect.

Kate Miller

Track C

COLDWELL BANKER VANGUARD REALTY

Dear Homeowner,

You may be aware that I just SOLD a home in your neighborhood. Since I have customers who are interested in your neighborhood, I am in a unique position to help homeowners who are thinking about placing their home on the market. You will achieve your best price with the agent who has had the most success recently, because that is the agent who can give you the best answers.

Things to think about if you are considering placing your home on the market:

- How much lead time do you need before closing on your home after it is sold?
- What price range do you think the home is in today, and at what price do you expect it to sell?
- What steps do you need to take to get the best possible price?
- What closing costs does a seller normally pay and how will this affect the price and the amount you receive when the sale is complete?
- What makes a good real estate agent and what is important to you when working with an agent?

Kate Miller

7563 Philips Hwy., Suite 203
Jacksonville, FL 32256
www.CBM.KateMiller.com

JOE SMITH
1234 MAIN STREET NORTH
JACKSONVILLE, FLORIDA 32205

Jacksonville, FL 32256

Trifold Brochures

Make the Move

Kate Miller

Why Coldwell Banker?

- Nearly 97,000 sales associates and 100,000 employees
- Operating in 100+ countries and 1,300 offices
- Top 400 Real Estate Franchises
- Banker brand name and brand equity
- Local agents and support
- Obtain the best price in the least amount of time
- Call for a free analysis today

Photography Booklets

Make the Move

My commitment to my buyer

COLDWELL BANKER VANGUARD REALTY

Kate Miller

My commitment to my seller

COLDWELL BANKER VANGUARD REALTY

Kate Miller

Meet My Professional Photographers



Kate Miller

Getting the most out of your property

25

BUSINESS EXPENSES

ITEM	LAST YEAR'S EXPENSE		THIS YEAR'S EXPENSE	
	MONTHLY	ANNUALLY	MONTHLY	ANNUALLY
Dues (RE Board Dues/MLS Dues)				
Business Entertainment (Meals, Coffee, Cocktails, Events)				
Coaching				
Communication (Mobile Phone, Home Bus. Line, Internet)				
Education (Seminars, Books, CD's, etc.)				
Equipment & Supplies (Computers, Office Supplies, etc.)				
Accounting/CPA (Taxes)				
Marketing				

NOTES

Daily Goal Sheet -- Strive for 75 Points Each Day

Task	Points Available	Days of the Week							Weekly Goal	Actual
		Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.		
Send five letters or cards to your SOI	5									
Contact for-sale-by-owner(s) FSBO	10									
Contact expired listing(s)	10									
Follow up with FSBO or expired contact previously made	5									
Send five letters or cards to your farm area	5									
Follow up with your existing listing clients	1 per client									
Follow up with past clients and customers	1 per client									
Send a note of thanks to someone who has helped you lately or provided you with good service.	5									
Send a news link to someone you know.	5									
Send five postcards or letters to apartments regarding the availability to buy a home	5									
Read a marketing or real estate productivity letter from a magazine or website.	10									
Listen to a motivational or real estate related CD	10									
Review your written goals	10									
Plan activities and tasks for the next day.	5									
Write a blog for your website	5									
Send a card of appreciation to someone you know	5									
Total Points Scored										

Name _____

From _____

To _____

PROGRESS CHART

	JANUARY	FEBRUARY	MARCH	APRIL	MAY
Days Worked					
Hours Prospected					
Contacts: Past Clients/SOI (5)					
Contacts: New Connection (5)					
Contacts: Lead Follow Up (4)					
Buyer Leads					
Buyer Appointments Gone On					
Listing Leads					
Listing Appointments Gone On					
Listings Taken					
Price Reductions					
Listing Sold					
Buyer Sales					
Team Member Sales					
Closed & Paid Transactions					
Closed Income					
Expired/Withdrawn Listings					
Cancelled Transactions					
Open Houses Held					
Social Media Posts					
Mailers					
Newsletters Out					
Total Income					
Additional Income					
Other Successes					

BUSINESS PLANNER COMMITMENT

We pledge, each to the other, that we will work together to build our business by completing our Business Plan and working through difficulties that may arise during the course of the year.

As Director of Market Development, I commit to you that I will;

1. Work to assist you in growing your business by
 - » Meeting with you at our scheduled times
 - » Providing guidance in completing your plan
2. I will always work to find the best solutions for you by
 - » Listening to your issues and opportunities
 - » Giving you honest opinions and advise
3. Help you improve your technical skills, as you request, including
 - » Developing new markets
 - » Reaching established markets
 - » Maximizing your marketing dollars
 - » Learning buyer and seller presentations that will increase the publics' perception of your professionalism and increase your sales to prospect ratio.

You commit to me that you will;

1. Be prepared when you attend our meetings by
 - » Sending the Pre Meeting form to me at least one day prior to the meeting
 - » Respecting my time constraints by being on time for the meeting and having an agenda
2. Strive to complete your Business Plan by
 - » Completing your Marketing Plan as outlined in the Business Plan
 - » Completing the marketing efforts that are outlined in the plan
 - » Recording your results in the Weekly Success Planner until we both agree that you understand where your business comes from, what the best usage of your time, effort and money are and how you can be most effective.
3. Work to develop your technical sales skills, including
 - » Listing technique
 - » Prospecting technique
 - » Buyer conversion technique.

Director Market Development

Real Estate Professional

Tear Out



Name: _____ Office: _____

DONATION PLEDGE (PLEASE CHECK ONE)

Per Commission Donation:

___ I elect to donate \$10, \$25, \$50, \$100 or \$_____ from each of my sales to CBV CARES and authorize Coldwell Banker Vanguard accounting services to deduct this amount from each commission check for the period of _____, through _____. (Staff to remind prior to closing.)

Monthly Donation:

___ I elect to make a monthly donation of \$_____ to CBV CARES.

One-Time Donation:

___ I elect to make a one-time donation of \$_____ to CBV CARES.

Signature _____

Received by CBV Cares: _____

Tear Out

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VANGUARD REALTY

BUSINESS PLAN

PERSONAL & CONFIDENTIAL

12-2015



If your property is listed with a real estate broker, please disregard. It is not our intention to solicit the offerings of other real estate brokers. We are happy to work with them and cooperate fully. ©2016 Coldwell Banker Real Estate LLC. A Realogy Company. All Rights Reserved. Coldwell Banker Real Estate LLC fully supports the principles of the Fair Housing Act and the Equal Opportunity Act. Each Office is Independently Owned And Operated. Coldwell Banker, the Coldwell Banker Logo and "We Never Stop Moving" are registered service marks owned by Coldwell Banker Real Estate LLC. All information deemed reliable but not guaranteed. USAA® Real Estate Rewards Network is offered by USAA Relocation Services, Inc., a licensed real estate broker and subsidiary of USAA Federal Savings Bank. Program may be unavailable for employer-sponsored relocations. Not available for transactions in Iowa or outside the US. This is not a solicitation if you are already represented by a real estate broker. Obtaining a mortgage from USAA Bank is optional, not required to utilize the USAA® Real Estate Rewards Network, and can be acquired from other sources. Use of the term "member" does not convey any legal, ownership, or eligibility rights for property and casualty insurance products. Ownership rights are limited to eligible policyholders of United Services Automobile Association. USAA means United Services Automobile Association and its affiliates.

