



# 2023 BUSINESS PLANNING

REAL ESTATE AGENT EDITION



CREATING  
**EXPERIENCES**  
**THAT MATTER™**



## BUSINESS PLANNING—ADVICE TO GET YOU STARTED

APM has a long history of setting time aside each year to plan out the coming year's path for success. We believe that the more intentional we are about what we want to accomplish, the higher the likelihood of achieving our goals. We also believe that, in a rapidly changing, dynamic industry such as the real estate industry, it is necessary to review, reaffirm or reset our course every 90 days.

For you as real estate professionals, it's critical to plan, outline and set the course for your individual plan. To that end, we invite you to focus on the following five areas:

- › Prospecting & Marketing
- › Business Partners
- › Customer Experience
- › Business Growth
- › Personal Development

### GOALS

A goal is the desired result that a person/organization seeks to achieve because of implementing strategies and intentions. A goal:

- › Defines the destination
- › Changes the direction or mindset to move toward a new destination
- › Creates the necessity to develop specific tactics

### STRATEGIES

Often confused with goals, strategies are the stepping stones to achieving a goal. Strategy, which is derived from ancient Greek for "generalship," is the method or plan that is executed to bring about a desired future, the Goal. Strategies are the specific projects or tactics to get from where you are to where you want to go.

In the planning process, we recommend you work 90-day strategies. There is no limit to the number of strategies, but recommend no more than 3 every 90 days. Keeping in mind that 3 every 90 days is a total of 12 strategies for the year. Consider your bandwidth and resources before the plan is finalized.

### ACTION ITEMS

Stated simply, this would be the step-by-step actions or activities that must take place for a strategy to be achieved or for a strategy to be implemented. Set these at 90-day increments and in order of priority.

## HERE'S TO A TERRIFIC 2023!





# LET'S GET STARTED

Before you plan for the year, a critical step is the evaluation process. We move so fast in our roles—taking care of clients, putting out fires, jumping into the next meeting—that we can forget to stop and evaluate what we're doing, how we're doing it and why. Our hope is that by taking the time to pause and reflect, you will be able to see your role with more clarity and be energized to tackle the challenges ahead.

# 2022 SELF EVALUATION

Be honest as you look back at the previous year. The intention of this exercise is to identify the key habits, disciplines and activities you want to carry into the year ahead and which ones you need to leave behind.

1. What were your successes, what went well?

2. What were the challenges, what didn't go so well?

3. What did you hope to accomplish but did not, and why?

4. What were your 3 top moments or things that brought you joy?

# 2022 SELF EVALUATION CONT.

5. What were 3 things that drained your energy or focus?

6. What is one thing you will do differently, and why?

7. What skills and talents do you use the most?

8. How are you preparing for your days/weeks?

# 2022 SELF EVALUATION CONT.

On a scale of 1 to 10, how would you rate yourself in the following areas for 2022?

- 1. Time dedicated to the relationships that matter
- 2. Your production results
- 3. Your ability to source new business
- 4. Time spent learning new strategies or technology
- 5. Your relationships with business partners
- 6. Your daily/weekly disciplines to work your business plan
- 7. Your sales and marketing activities
- 8. The service you deliver to your clients
- 9. Time dedicated to your personal health and wellness
- 10. Your progress toward personal goals

CHECK ONE									
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# PRODUCTION RESULTS

Review your personal results for 2022:

	2022 RESULTS
# OF CLOSED SELLER-SIDE TRANSACTIONS	
# OF CLOSED BUYER-SIDE TRANSACTIONS	
# OF LISTING APPOINTMENTS	
LISTING CLOSE RATIO (TAKEN/CLOSED)	
# BUYER CLIENTS	
BUYER CLOSE RATIO (MEETINGS/CLOSED)	
AVERAGE SALES PRICE	
AVERAGE LISTING DAYS ON MARKET	
AVERAGE CLIENT CLOSING CYCLE (DAYS)	
# PROSPECTS REQUIRED TO ACQUIRE CLIENTS	
TOP 5 SOURCES OF BUSINESS	

**“YOU CAN’T BE THAT KID STANDING AT THE  
TOP OF THE WATERSLIDE, OVERTHINKING IT.  
YOU HAVE TO GO DOWN THE CHUTE.”**

— TINA FEY



# LOOKING FORWARD

The next step is to look forward to the year ahead. The intention is to identify what is most important to you, to foresee any potential challenges and to create excitement as you step into the future.

1. What matters most to you?

2. What does success look like to you?

3. If you could focus your energy in one area, what would it be?

4. What is your biggest opportunity this year?

# LOOKING FORWARD CONT.

5. How could you better leverage your skills & talents?

6. Are there any immediate opportunities to improve your discipline, focus or service?

7. What could trip you up, and how will you mitigate this?

8. What will be your daily/weekly disciplines to work on your business plan?

# PRODUCTION KEY METRICS

Set your metrics for 2023:

	2023 GOALS
DESIRED INCOME	
AVG. COMMISSION PER CLOSING	
# CLOSED TRANSACTIONS REQUIRED	
TRANSACTION MIX (BUYER/SELLER)	
# BUYER-SIDE TRANSACTIONS REQUIRED	
# SELLER-SIDE TRANSACTIONS REQUIRED	
TOTAL # TRANSACTIONS REQUIRED	
# APPOINTMENTS/MEETINGS REQUIRED TO MEET TRANSACTION GOALS	
# PROSPECTS REQUIRED TO MEET TRANSACTION GOALS	

“IF YOU GO TO WORK ON YOUR GOALS, YOUR GOALS WILL GO TO WORK ON YOU. IF YOU GO TO WORK ON YOUR PLAN, YOUR PLAN WILL GO TO WORK ON YOU. WHATEVER GOOD THINGS WE BUILD END UP BUILDING US.”

— JIM ROHN

# BUILDING BETTER HABITS: CHANGE YOUR HABITS. CHANGE YOUR LIFE.

## The 4 laws for building / breaking habits:



BUILDING GOOD HABITS	BREAKING BAD HABITS
1. Make it obvious	1. Make it invisible
2. Make it attractive	2. Make it unattractive
3. Make it easy	3. Make it hard
4. Make it satisfying	4. Make it unsatisfying

**“A HABIT IS A BEHAVIOR THAT HAS BEEN REPEATED  
ENOUGH TIMES TO BECOME AUTOMATIC.” – JAMES CLEAR**

1. What is my new habit?

2. Why do I want to start this habit?

3. Who will hold me accountable?

**“WE ARE WHAT WE REPEATEDLY DO. EXCELLENCE  
THEN, IS NOT AN ACT, BUT A HABIT.” – WILL DURANT**



**FOCUS  
ON THE GOAL  
NOT THE  
OBSTACLES**

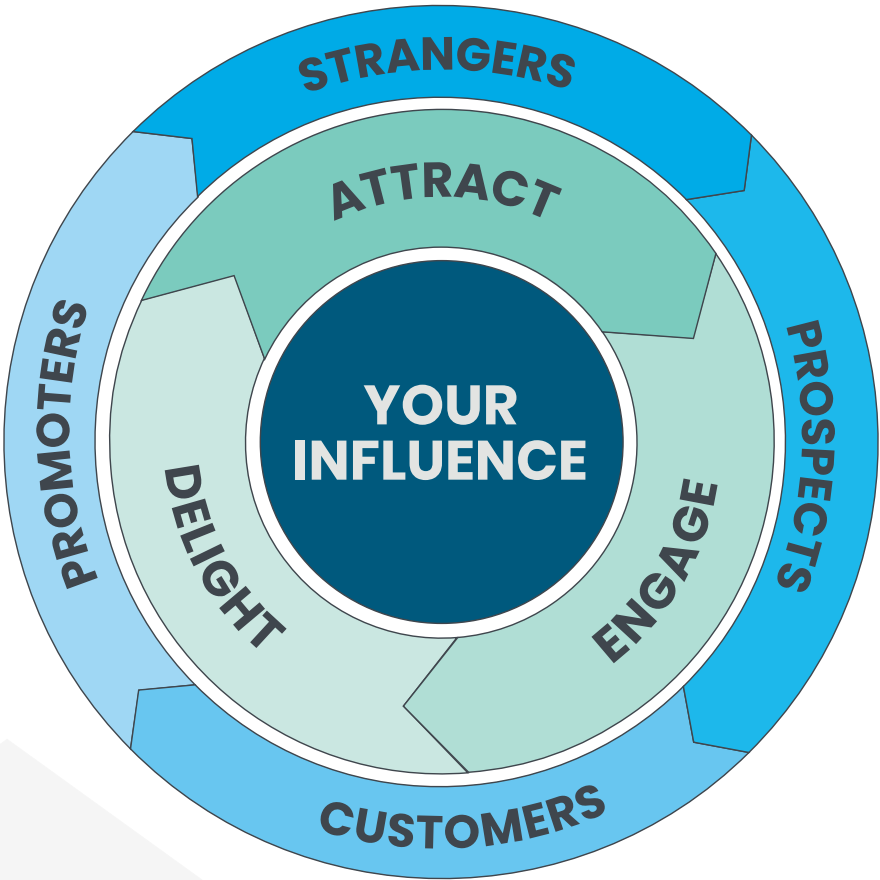
# WHAT'S NEXT FOR YOUR BUSINESS?

## 4 KEY AREAS

**PROSPECTING & MARKETING  
BUSINESS PARTNERS  
CLIENT EXPERIENCE  
BUSINESS GROWTH**

- Set a goal for 2023 in each of these four categories
- Set your 90-day strategies for each goal (including what to keep, change or start)
- Identify the action items necessary
- Save your 90-day sprint and repeat the planning process every 90 days

# VIEWING YOUR BUSINESS AS A FLYWHEEL WILL HELP YOU MAKE STRATEGIC DECISIONS





# BEST PRACTICE FOR WEEKLY DISCIPLINES & FOCUS

## Daily Disciplines:

- Spend the majority of your time every week on revenue-generating activities, which means generating new leads or opportunities and converting leads into clients.
- Have 10 conversations with people every day—5 people you know and 5 people you do not know.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
PLANNING & SETTING INTENTIONS	CURRENT CLIENTS	PRE-APPROVED & LOOKING	BUSINESS PARTNERS	MARKETING & PROSPECTING
Start your week right with planning, aligning to your business plans, time blocking, course correction from the prior week, setting goals and intentions for the week.	Focus on all the clients in your pipeline. This includes activities such as: status updates, communication, check-ins, dates and deadlines, and outreach to all interested parties.	This day is for following up with all of those clients who are pre-approved but still looking. Give them an update on the market, new opportunities that have come available, and revisit properties that have changed list price, concessions, etc.	A day dedicated to the partners you work with, including those who currently send you business, and those who haven't yet. Reach out to them to touch base, see how you can work together, and ask for referrals.	This is your creative day. Stretch your skills, push your comfort zone, and spend time on sales and marketing activities. Focus on connecting and finding new business, and prepare for open houses for the weekend.
DAILY TIP	DAILY TIP	DAILY TIP	DAILY TIP	DAILY TIP
Connect with your team about the pipeline, expectations and activities for the week. Always make sure they know the goals and actions for the week.	Every client should feel a connection, whether via video or phone, whether a status report or a check-in.	Touch base with the intent of talking through next steps, out-of-the-box options, or perhaps future needs if the market isn't cooperating. Reassure your buyers that you're still out there working for them—and take notes!	Work your business plan and strategies related to your business partners.	Record videos, build content for social media and analyze/adjust your marketing strategies.

# PROSPECTING & MARKETING

90-day time frame: \_\_\_\_\_

Enter dates

GOAL:

What will you keep doing?

What will you change?

What will you start doing?

# BUSINESS PARTNERS

90-day time frame: \_\_\_\_\_

Enter dates

GOAL:

What will you keep doing?

What will you change?

What will you start doing?

# CLIENT EXPERIENCE

90-day time frame: \_\_\_\_\_

Enter dates

GOAL:

What will you keep doing?

What will you change?

What will you start doing?

# BUSINESS GROWTH

90-day time frame: \_\_\_\_\_

Enter dates

GOAL:

What will you keep doing?

What will you change?

What will you start doing?

# NOTES





# SALES STRATEGIES

IDEAS TO GET  
YOU STARTED

**Below is a list of sales-related strategies for you to consider incorporating into your business plan.**

### **PROSPECTING & MARKETING**

1. Dedicate 1 hour per day in my schedule toward lead-generating actions, such as calling new opportunities, lead follow-up, and other marketing activities both to new and existing business partners.
2. Enhance my community outreach and/or participation with a charitable organization, group, team or cause that matters to me. Involvement may be time, money or both for a means to give back.
3. Start a new advertising campaign in the community; partner with local businesses and organizations to promote my products and services.
4. Evaluate my reach—does my community know what I do? If not, develop a marketing plan to communicate regularly with my community to increase awareness and showcase my expertise.
5. Develop my personal brand to show my value proposition and expertise, along with my passions, interests and authentic self.
6. Dedicate ~3 hours per week towards social likeability. Not just with the content I share, but getting an enhanced audience that likes, knows and trusts me. Be intentional every week to build a larger online community.
7. Start a video playlist (e.g., YouTube, TikTok, LinkedIn or IG) with a variety of content related to homeownership, answering real estate questions, and general advice and expertise for consumers. Add to my playlist at least once per week.
8. Leverage my CRM for my database management & marketing to increase my referral source of business to ~25% coming from my database audience. Spend time monthly reviewing my contacts, content, and touchpoints, adjusting as needed.

### **BUSINESS PARTNERS**

1. Dedicate one day per week (e.g., Thursdays) to connect with my business partners. Develop a script or talk track each week for connection and relevance.
2. Invest in lead acquisition to drive new business to myself and my business referral partners.
3. Join a networking group where I make building relationships my expertise and a source of new business.
4. Identify and adopt into my business 1 NEW referral source of business for me to engage with to increase my business by ~10%.
5. Establish a list of new “potential” referral partners; work the list each week to build connections and relationships and turn them into business partnerships.
6. Establish at least one affinity partnership as a source of new business—such as schools, alumni associations, local businesses, HR departments or other trade professionals.

## CLIENT EXPERIENCE

1. Enhance the customer experience by delivering personalized services, how and when they need help. Update my approach so I exceed their expectations in communication, technology and experience.
2. Design my “way” to stand out from the crowd, something that makes me different from others in my local market. Once defined, implement at every stage of the transaction (attract, engage and delight).
3. Work with business partners to increase by connections by adding virtual meetings, videos, and/or webinars to provide value-add education and advice for consumers and referral partners. Adopt an effective follow-up system to keep engagement, interest and a high close ratio of prospects.
4. Evaluate the activities of my competitor(s) in my market. Where are they showing up; what are they doing that I am not? Determine how I am different and use that to market myself for new business.
5. Personalize the client experience by designing memorable moments during the transaction. Determine what will provide that “something extra” and do it (and make it my trademark move!).
6. Integrate more of my team into the client experience—set service-level commitments mutually agreed upon for everyone involved in delivering the highest client experience.

## BUSINESS GROWTH

1. Evaluate myself, my schedule and my wins and losses on a weekly basis. Integrate this evaluation practice so I adapt each week to be my very best self and deliver the best experience to my customers.
2. Be mentored by a top agent or business coach to learn the disciplines, practices and tactics that bring them success. Implement the learnings from these coaching sessions, and amend strategies as needed.
3. Discover and mentor a brand-new real estate agent—enhancing my team with a licensed real estate professional that can help with transaction coordinations and customer relations to help grow my business by ~15% by utilizing them as an additional resource.
4. Adopt strong weekly planning so I have an effective work-life balance, where my personal and professional goals are complementary, and one isn’t sacrificed.
5. Listen to/read one book per month that will keep me focused on my personal and professional goals.
6. Sign up for coaching or an accountability partner that will keep my goals and intentions on track in order to achieve my personal and professional goals.



# WHAT'S NEXT FOR YOUR PERSONAL GROWTH?

**MAKE YOUR PLAN**

PERSONAL WELLNESS • LEARNING  
FINANCIAL SECURITY • RELATIONSHIPS

# PERSONAL DEVELOPMENT

90-day time frame: \_\_\_\_\_  
Enter dates

## 1. HEALTH & WELLNESS

GOAL: \_\_\_\_\_

What to keep doing: \_\_\_\_\_

What to change: \_\_\_\_\_

What to start doing: \_\_\_\_\_

## 2. INTELLECTUAL & LEARNING

GOAL: \_\_\_\_\_

What to keep doing: \_\_\_\_\_

What to change: \_\_\_\_\_

What to start doing: \_\_\_\_\_

## 3. FINANCIAL SECURITY

GOAL: \_\_\_\_\_

What to keep doing: \_\_\_\_\_

What to change: \_\_\_\_\_

What to start doing: \_\_\_\_\_

## 4. RELATIONSHIPS & WORK-LIFE BALANCE

GOAL: \_\_\_\_\_

What to keep doing: \_\_\_\_\_

What to change: \_\_\_\_\_

What to start doing: \_\_\_\_\_



## List of Strategies to Implement into Personal Development & Wellness Plan:

1. Set a consistent schedule for daily exercise, committing to move my body every day.
2. Make my health a priority, including making appointments for wellness checks and testing, to ensure that I'm providing myself and my family the healthiest version of me.
3. Commit to start or continue an exercise regimen and food plan that is realistic and improves my overall health.
4. Join a sports team/league to get into physical shape and expand or maintain team interactions.
5. Explore mental health needs for myself and my family, pulling in support where needed.
6. Determine the right work schedule for me and stick with it. Meaning, when I do what, when I start and end, where I do my best work, when I take breaks, etc.—to ensure I am achieving my professional and personal goals.
7. Work on better sleep habits to improve my health—by managing my routines, schedule and patterns.
8. Give something up. Evaluate a bad habit, practice or spending habit to eliminate this year, come up with a plan for success; and replace my bad habit with a positive one.

9. Increase my learnings and skills by dedicating ~2 hours per week to engaging with online learning resources—such as podcasts, audiobooks, online courses and other knowledge-based resources.
10. Read ~12 books this year (at least one book per month).
11. Learn something new. This could be either in work life or personal life. Carve out time each month to dedicate toward this new skill or learning.
12. Start a blog or journal weekly writing practice. Capture things such as dreams, memories, history, gratitude, human interactions, or other thoughts and intentions.
13. Schedule time every day/week for personal meditation, reflection and learning.



## List of Strategies to Implement into Personal Development & Wellness Plan CONT:

14. Set a monthly budget and commit to keeping it.
15. Obtain a copy of my credit report and correct any errors, then use the report to build a plan to begin paying down debt.
16. Increase my overall savings and investments by committing to save ~10% of my earnings.
17. Determine a minimum of three financial goals (i.e., saving for a down payment, purchasing a car or investing) including likely roadblocks, as well as actionable steps required to meet my goals.
18. Dedicate myself to creating work-life harmony by diligently ensuring that there is time every day to feed myself professionally and personally.
19. Work as a household to declutter or organize our home. Donate excess when possible or dispose of broken or obsolete items.
20. Plan, save for and take that dream vacation with those I love.
21. Get my financial house in order by setting up a personal will or trust this year.

22. Pledge to eating dinner as a family (whatever family means to me) at least 4 times per week.
23. Allocate ~2 hours per week for one-on-one time with my partner and children doing something that connects and brings us peace. This can be going for a walk, sitting down for an uninterrupted coffee break, starting a new hobby together, or anything else that we find enjoyable.
24. Tend to personal relationships, carving out ~5 hours per week to touch base, connect and reinforce the importance of those relationships.
25. Commit to, or enhance, my involvement with a charity or cause that matters to me via donations or volunteering.
26. Join a club, community or networking group to establish new friendships and/or build connections that can provide an opportunity to advance professionally.
27. Bring a pet into the household this year.
28. Host a friend-dinner party on a quarterly basis, or another favored activity, to connect with friends that are important.

# NOTES

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EXPERIENCES  
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