

## SECTION 2: MOTIVATIONS

### WHY

**What motivates you? A powerful “Why” comes out of a clear understanding of self. Do not write what should motivate you. Acknowledge the truth about what drives you.**



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### ACCOUNTABILITY

**What additional accountability do you need to ensure your success? Let your coach know.**

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### COMMITMENT

**Why is achieving your stated goals a must for you?**

Interested? Committed? Obsessed? You're about to lay out your plan for 2024, your bridge to your future. But a plan without the will to execute is only words on a page. So, write a message to yourself and your coach stating how seriously you are committed to implementing this plan and being held accountable to it.

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## SECTION 3: UNITS & GOALS

**With your goals now established, it's time to delve into the seasonality of your business**

Utilize the grid below to strategize your target units for the upcoming year, ensuring you take into account the fluctuating unit volumes across different seasons.

### Projected Units Sold per Month and per Quarter

**2024**

<input type="text"/>	January	}	<input type="text"/>	Quarter 1
<input type="text"/>	February			
<input type="text"/>	March			
<input type="text"/>	April	}	<input type="text"/>	Quarter 2
<input type="text"/>	May			
<input type="text"/>	June			
<input type="text"/>	July	}	<input type="text"/>	Quarter 3
<input type="text"/>	August			
<input type="text"/>	September			
<input type="text"/>	October	}	<input type="text"/>	Quarter 4
<input type="text"/>	November			
<input type="text"/>	December			

# SECTION 3: UNITS & GOALS

## KPIs

Let's establish the necessary actions that will drive you toward accomplishing your goals.

What percentage of listing appointments result in signed listing agreements?

What percentage of signed listings close?

What percentage of buyer consultations result in a signed, exclusive, buyer-agency agreements?

What percentage of signed agreements close?

### Conversations

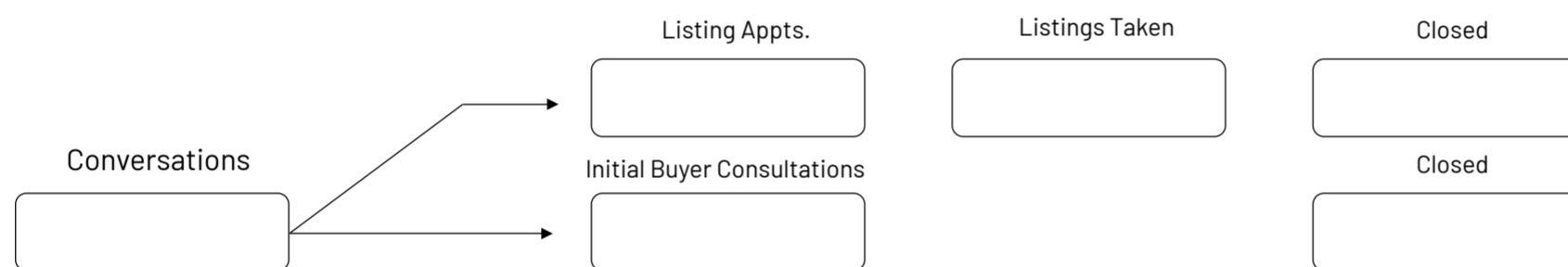
How many conversations do you have per closed transaction?

On average, how many conversations per HOP (Hour of Power) do you have?

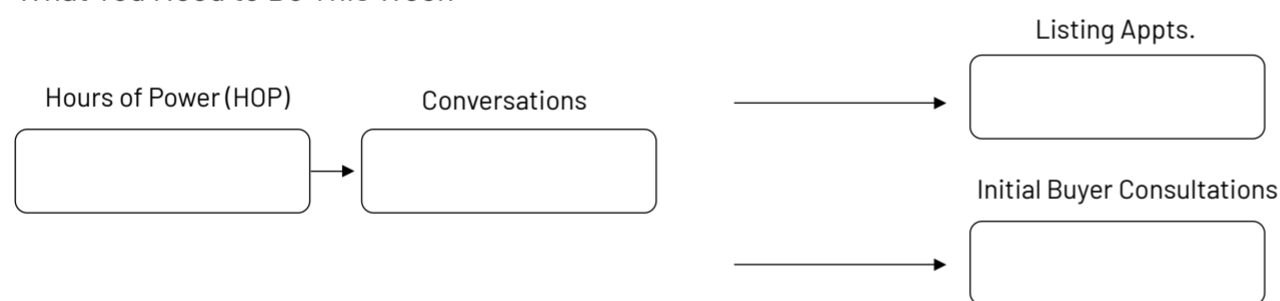
How many days a week do you intend to intentionally prospect?

How many weeks a year are you planning to take off?

### What You Need to Do This Year



### What You Need to Do This Week



### What You Need to Do Today!



## SECTION 5: OPERATIONS

**List your lead sources you have (or plan on having) SOPs for?**

	SOP?	YES	NO
_____		<input type="checkbox"/>	<input type="checkbox"/>
_____		<input type="checkbox"/>	<input type="checkbox"/>
_____		<input type="checkbox"/>	<input type="checkbox"/>
_____		<input type="checkbox"/>	<input type="checkbox"/>
_____		<input type="checkbox"/>	<input type="checkbox"/>
_____		<input type="checkbox"/>	<input type="checkbox"/>
_____		<input type="checkbox"/>	<input type="checkbox"/>
_____		<input type="checkbox"/>	<input type="checkbox"/>

**List out and prioritize the specific operational actions you need to complete in 2024 in order to get you one step closer to your 5-year vision.**

Operations is about streamlining your business and improving efficiencies. Reflect on your business (this is a great activity to focus on with a coach). What areas can you work on that will have the greatest impact?

2024 Operations Initiatives	Date	Priority
_____	/	_____
_____	/	_____
_____	/	_____
_____	/	_____
_____	/	_____
_____	/	_____

# SECTION 6: FINANCIAL

**“It doesn’t matter what you gross, it’s your net earnings that give you opportunities for wealth creation.”**

**-TF**



\*This is not intended to be used in lieu of professional tax guidance. Calculations for pre-tax contributions as well as business expenses depend on entity structure and other accounting considerations.

\*Please enter the eight required inputs

Financial Plan	
Total 2024 GCI Goal	<input type="text"/>
Projected Net Commissions on GCI	<input type="text"/>
Other Real Estate Related Pre-Tax Income	<input type="text"/>
Total Projected Pre-Tax Income	<input type="text"/>
Projected 2024 Tax	<input type="text"/>
Projected Net Income Less Taxes	<input type="text"/>
Post-Tax Income from Other Sources	<input type="text"/>
Projected Net Income from all Sources	<input type="text"/>
Your 2024 Budget (incl. Business Expenses)	<input type="text"/>
Net Income Surplus (Black) / Deficit (Red)	<input type="text"/>

Budget Inputs	Monthly Spend	Annual Spend
Months in Coaching This Year	<input type="text"/>	<input type="text"/>
Personal Expenses	<input type="text"/>	<input type="text"/>
Business Expenses	<input type="text"/>	<input type="text"/>
Debt Reduction Goal	<input type="text"/>	<input type="text"/>
Pre-Tax Savings Goal	<input type="text"/>	<input type="text"/>
Post-Tax Savings Goal	<input type="text"/>	<input type="text"/>
Post-Tax Income from Other Sources	<input type="text"/>	<input type="text"/>
Combined Federal & State Tax Rate	<input type="text"/>	<input type="text"/>

## How to Allocate Each Commission Check

to Business Account	to Personal Account & Pre-Tax Savings	to Tax Account
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %