



TOM FERRY'S **BUSINESS PLAN**

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KEY PERFORMANCE INDICATORS 3 YEAR ANALYSIS

	2 YEARS AGO		LAST YEAR		THIS YEAR	
	ME	TEAM	ME	TEAM	ME	TEAM
Days Worked						
Total Hours of Power						
Listing Appointments						
Listings Taken						
Seller Sales						
Seller GCI						
Buyer Appointments						
Buyer Sales						
Buyer GCI						
Lessor GCI						
Lessee GCI						
Referrals Sent						
Referrals Received						
Referral GCI						
TOTAL UNITS						
TOTAL GCI						

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KEY PERFORMANCE INDICATORS 3 YEAR ANALYSIS

	NEXT YEAR		2 YEARS AHEAD		3 YEARS AHEAD	
	ME	TEAM	ME	TEAM	ME	TEAM
Days Worked						
Total Hours of Power						
Listing Appointments						
Listings Taken						
Seller Sales						
Seller GCI						
Buyer Appointments						
Buyer Sales						
Buyer GCI						
Lessor GCI						
Lessee GCI						
Referrals Sent						
Referrals Received						
Referral GCI						
TOTAL UNITS						
TOTAL GCI						

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VISION STATEMENT

I'M COMMITTED TO HAVE THIS YEAR BE MY BEST YEAR EVER BECAUSE...

PERSONAL VISION

PROFESSIONAL VISION

5 KEY AREAS TO **MASTER** PROFESSIONALLY

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

5 KEY AREAS TO **MASTER** PERSONALLY

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

TRANSACTION RESULTS / GOALS

LEAD SOURCE	LAST YEAR'S TRANSACTIONS		THIS YEAR'S TRANSACTIONS		
	SELLERS	BUYERS	SELLERS	BUYERS	ENHANCEMENTS NECESSARY THIS YEAR?
SUBTOTALS					
TOTALS					
	LAST YEAR		THIS YEAR		

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NEW PROSPECT CONVERSATIONS NEEDED

CONVERSATIONS CALCULATION			
ITEM		AMOUNT	DIRECTIONS
1	THIS YEAR'S TRANSACTIONS GOAL		INPUT total transactions you want
2	TOTAL NEW PROSPECT CONVERSATIONS NEEDED (ANNUALLY)		MULTIPLY Line 1 by 40 (conversation to sale ratio)
3	TOTAL NEW PROSPECT CONVERSATIONS NEEDED (MONTHLY)		DIVIDE Line 2 by 11 (months)
4	TOTAL DAILY NEW PROSPECT CONVERSATIONS NEEDED		DIVIDE Line 3 by 20 (monthly working days) *Minimum 5/5/4's

THE NUMBERS		
	YOU	TEAM
Income Goal for This Year		
Number of Transactions Needed for Goals		
Number of Listing Appointments Scheduled		
Number of Listings Taken		
Number of Listings Sold		
Number of Buyer Appointments Taken		
Number of Buyer Sales		

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THIS YEAR'S TOP LEAD GENERATION SYSTEMS

LEAD SOURCES

Main Lead Sources:

Past Client/Sphere/Database
Farm
Internet Leads
Open Houses
Expireds
FSBO/MMM

Other Sources:

800 Call Capture
Accountants
Absentee Owners
Affiliate Referrals
Agent To Agent Referrals
Attorneys
Blogging
Builder
Buyer Seminars
Cancelled Contracts
Centers Of Influence
Company Referral
Current Client Referrals
Corporate or Business Accounts
Demographic Farm
Direct Mail
Facebook
Financial Planners
Floor Time
Former Realtors
Google Ad
Google+
Instagram
Investors
Just Listed/ Just Sold
Linkedin
Networking Associates
New Home Sales
Notice Of Defaults
Traditional Open Houses
Relocation
REO
Sign Calls
Team Center of Influence
Twitter
Website
Youtube

Name:	Designed to generate _____ revenue
Basic System Outline:	
Team Players Involved:	Estimated Cost of System \$ _____

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Team Players Involved:	Estimated Cost of System \$ _____

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SYSTEMS & BUSINESS IMPROVEMENTS FOR GROWTH

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

8 PROGRESS CHART EXAMPLE

	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Days Worked												
Hours Prospected												
Contacts: Past Clients/COI (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												

COACH'S NOTE

We highly encourage you to download our Excel based Progress Tracker and add in the Key Performance Indicators that are right for you and your goals.

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DAILY ACTION CHECKLIST EXAMPLE

ACTIVITIES	MON	TUE	WED	THR	FRI	SAT	SUN
DATES:							
1. TWO HOURS LEAD GENERATION							
2. ONE HOUR LEAD FOLLOW UP							
3. WALK FARM							
4. OPEN HOUSE							
5. MEET WITH TEAM							
6. REVIEW NEW MARKETING							
7. GO TO GYM							
8. WATCH TOM FERRY SHOW							

COACH'S NOTE

You can download our editable [Daily Action Checklist](#) to build out a perfect week so that you take action on the activities you need to do weekly to accomplish your goals.

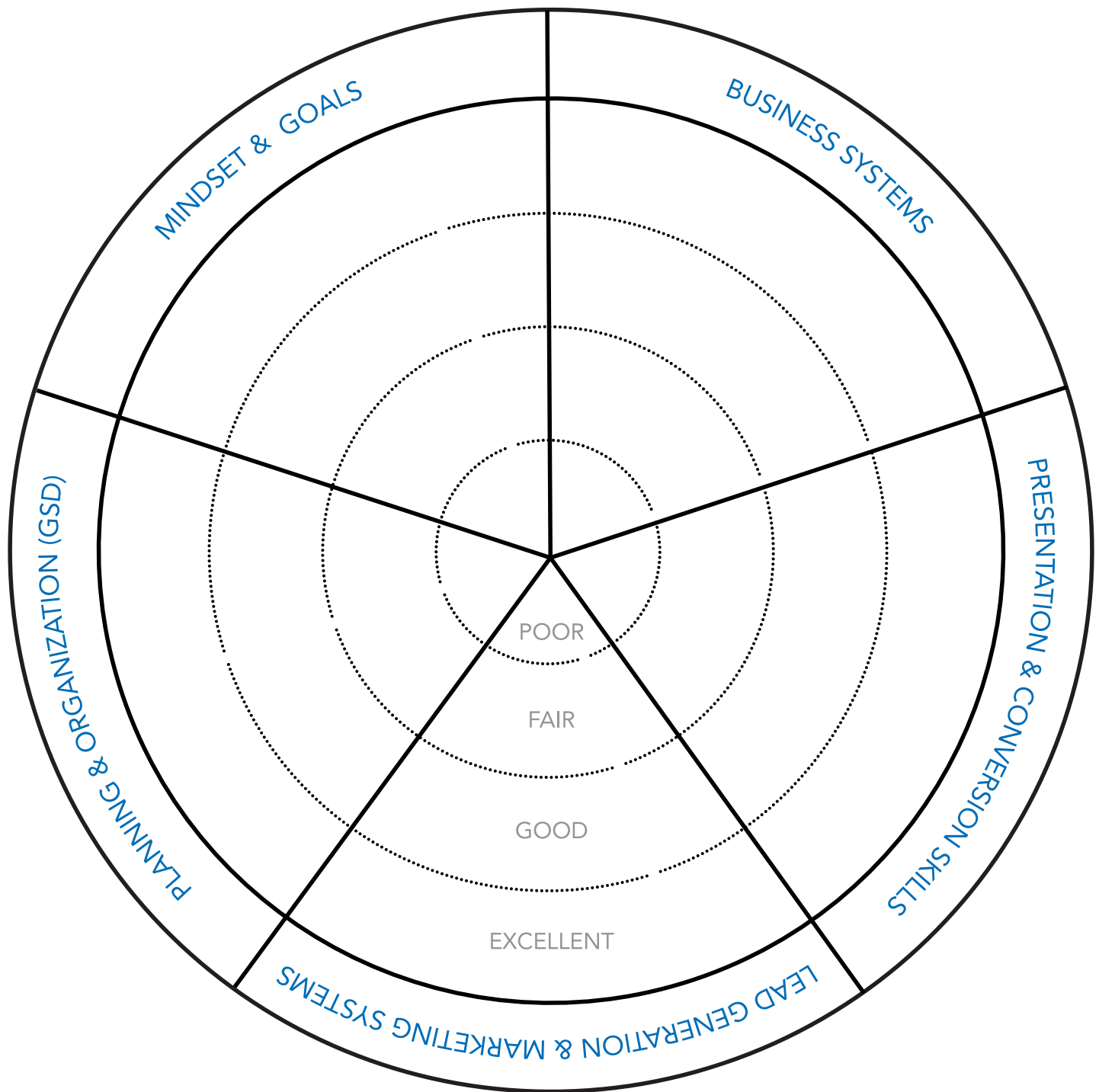
10 BUSINESS EXPENSES

ITEM	LAST YEAR'S EXPENSES		THIS YEAR'S EXPENSES	NOTES
	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 /Legal (Taxes)				
Marketing				
Print Advertising				
Online Advertising/Website				
Direct Mail				
Signs, Flyers, Brochures, Presentation Materials				
Promotional (Gifts, Event Tickets, Sponsorships, etc.)				
Marketing Consulting				
Other Marketing				
Other Marketing				
Misc. Sales Cost (Agent Paid Inspections, Repairs, Goodwill, Staging, etc.)				
Outside Services (Consulting, Book Keeping, etc.)				
Transaction Coordination				
Travel Expense (Airfare, Lodging ,Ground Transportation, Incidentals)				
IRA Contribution				
Wages (Assistant, Employees)				
Other				
Other				
Other				
Other				
TOTAL BUSINESS EXPENSES				

11 PERSONAL EXPENSES

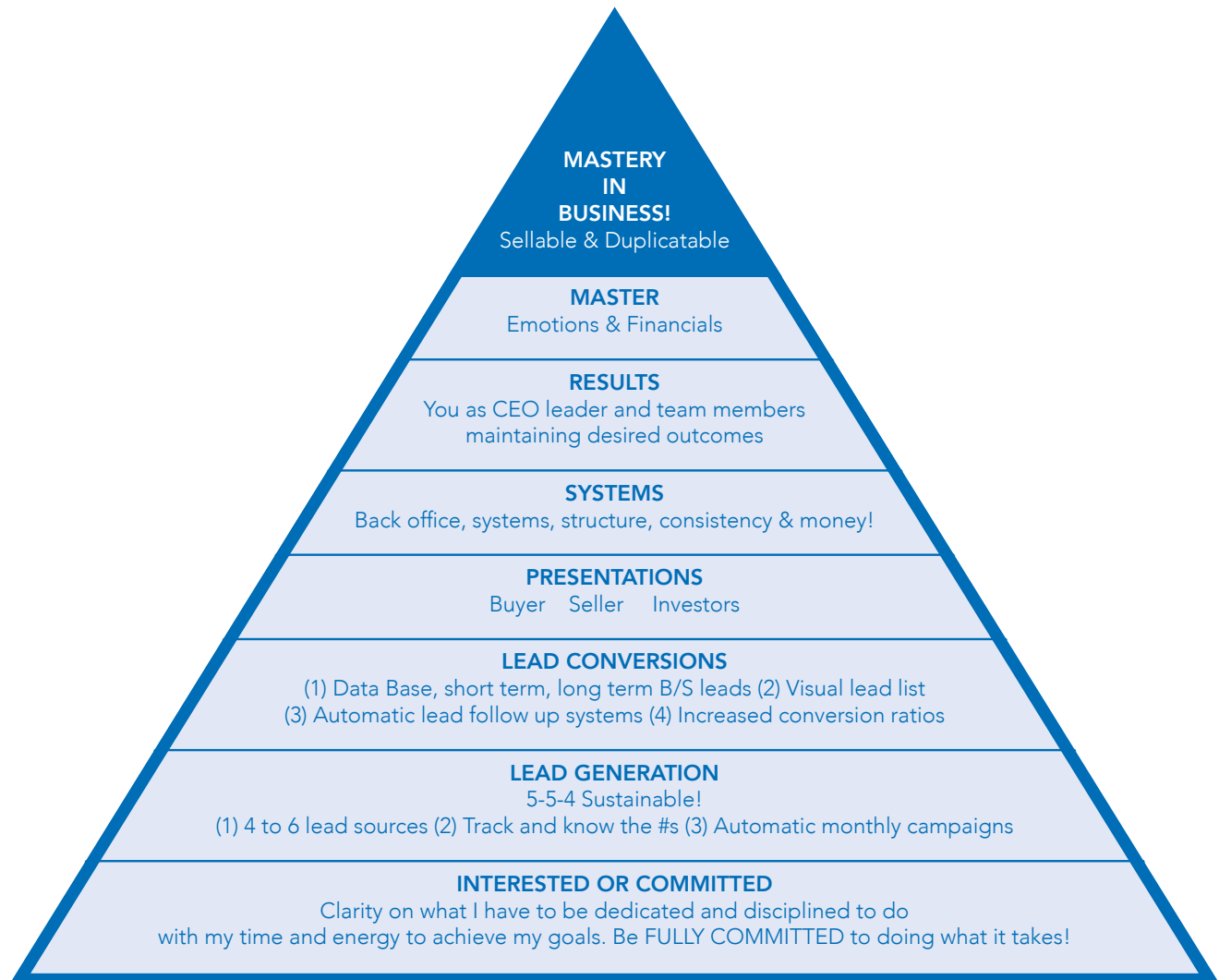
ITEM	LAST YEAR'S EXPENSES	THIS YEAR'S EXPENSES	NOTES
Auto Gas			
Auto Insurance			
Auto Maintenance			
Auto Payments (Lease/Loan)			
Auto Purchase			
Auto Registration			
CATV/Satellite TV			
Cell Phone			
Charitable Contribution			
Childcare			
Clothing			
Club Membership			
Entertainment			
Food & Groceries			
General Household Items			
Gym, Health & Beauty			
Home & Yard Maintenance			
Homeowners Insurance			
Household Utilities			
Life Insurance			
Medical/Dental Expense			
Mortgages/Rent			
Personal Savings			
Property Taxes			
School Tuition K-12			
Vacation			
Retirement Savings			
College Funds			
Other			
Other			
Other			
Other			
Other			
TOTAL PERSONAL EXPENSES			

12 BREAKTHROUGH SELF ANALYSIS



* Rate yourself from poor to excellent in each category

13 MASTERY



REMEMBER

"Mastery happens when you are committed to the breakthrough...

The decision that enough is enough and
you are no longer interested in your success,
you are COMMITTED to it!!"

-Tom Ferry

BUSINESS PLAN



NOTES

BUSINESS PLAN



NOTES

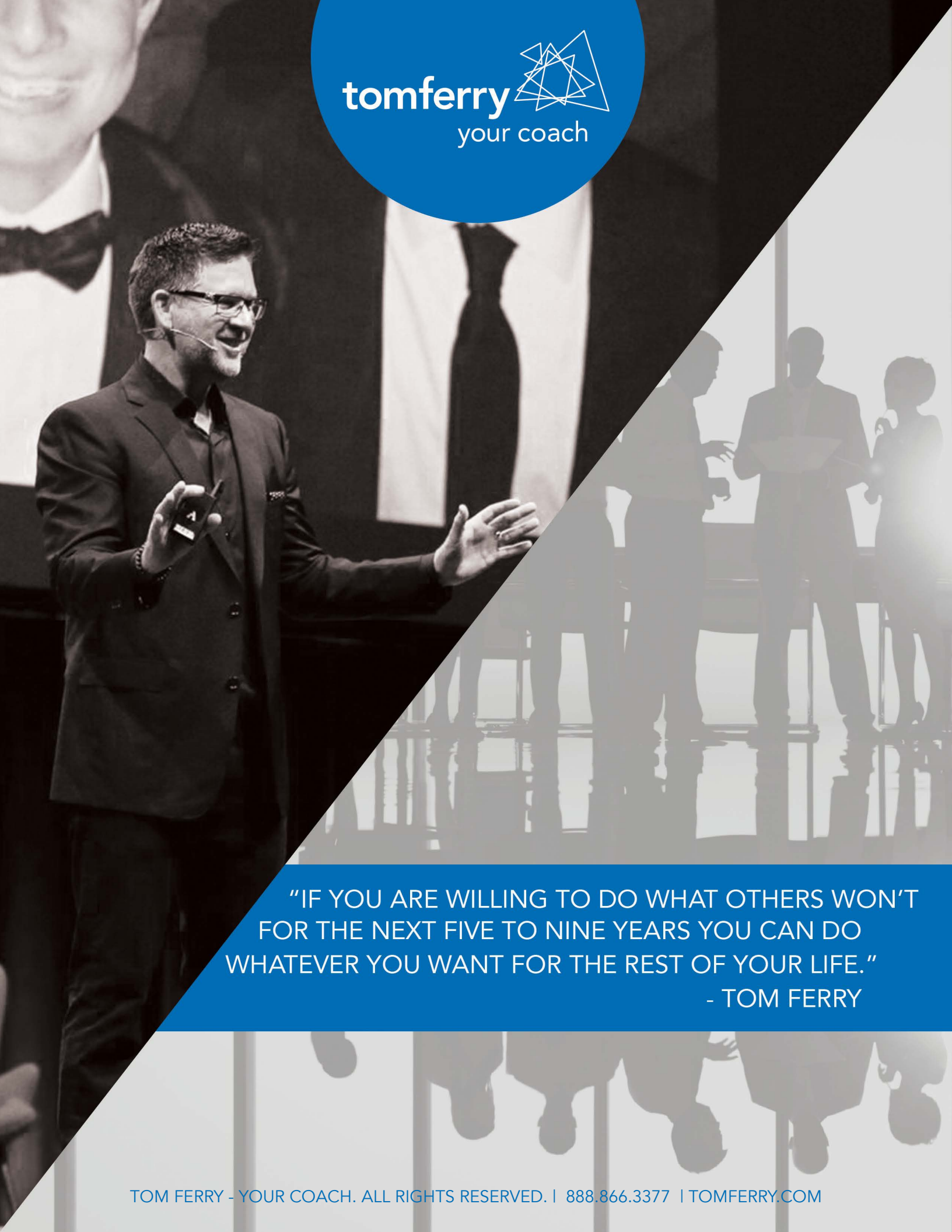
BUSINESS PLAN



NOTES



tomferry
your coach



"IF YOU ARE WILLING TO DO WHAT OTHERS WON'T
FOR THE NEXT FIVE TO NINE YEARS YOU CAN DO
WHATEVER YOU WANT FOR THE REST OF YOUR LIFE."
- TOM FERRY