

# 2019

## REAL ESTATE BUSINESS PLAN



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# Introduction

## Designed for your success in 2019!

As a real estate agent, you're constantly looking for ways to gain new buyer and seller leads, retain clients, earn referrals, and ultimately increase your bottom line. In today's competitive marketplace, grabbing new listings and closing deals means having a game plan you can rely on. It's easy to get caught up in the here and now, but your success is not just about what happens today. Prosperity comes from paving the road for every listing and closed deal moving forward. With PropertyPulse, we make things that much easier for you to achieve your marketing goals!

While many agents make the mistake of creating an initial business plan, looking at it once and then leaving it to gather dust in a file under the desk, we believe that constantly reinventing your business plan and adjusting your goals is key to your success.

We've created the 2019 Real Estate Business Plan with this in mind. In the next few pages you will have the opportunity for re-evaluate your goals for lead generation, identify your strengths and weaknesses, develop a marketing plan, and take control of your business and all it accomplishes in 2019.

**We've also included the following tools in your business plan:**

- ***S.W.O.T Identification Tool***
- ***Annual Goal Planning Tool***
- ***Lead Generation Calculator Tool***
- ***Budget Calculating Tool***



# 2019 Real Estate Forecast

## Outlook for the Real Estate Industry

According to the mid-year forecast from National Association of Realtors®, the number of existing home purchases is expected to rise **an additional 1.8%, to 5.7 million**, in 2019. Home prices and mortgage rates are both expected to rise.



Another momentous change anticipated to hit the real estate market in 2019 is the rebound of those forced to foreclose on their homes from the recession in 2009 (nearly 10 million Americans). For nearly **1.5 million** of the so-called “boomerang buyers,” the seven-year waiting period between foreclosure and the opportunity to take out a new mortgage have passed. Now these rebounded buyers will be re-entering the housing market, once again.

With the predicted increase in mortgage rates, current homeowners considering a change may be a bit discouraged but those with a stable income, there will be less of an impact. In addition, first-time home buyers and millennials may face slight challenges due to higher mortgage interest rates and rising home prices.



# Tips for Success

## Lead Generation

Your lead generation goals should always be improving. Here are 4 lead generation rules to follow according to GM, Jack Markham, creator of the 10 Day Action Plan.

### Rule #1: Constantly generate leads

Remember the number of leads you need in order to close 5X more transactions. Keep that goal in mind and aim for it, whether the lead is coming in are capture form on your website, your sphere, or an additional source you're paying for.

As a PropertyPulse user, your website includes:

- Lead generation to capture prospects on your website
- Contact management system to stay on top of communications
- MLS/IDX Feed to provide real-time listing information

### Rule #2. Always be on the hunt

Don't bank on the leads already in your pipeline. Keep counting and keep hunting for more. Dedicate at least 2-3 hours a day generating leads. Like most things we do in life, it's time vs. money, so if you don't want to spend valuable time, then it's best to partner up with a company that can help you generate leads so you can hit your transaction goals. Also, if your lead-generating efforts are easily diverted, set up alerts or send yourself auto-reminders when a new lead has entered your pipeline by using a contact management system.



# Tips for Success

## Rule #3. Always look for free instruction

Like good athletes who are always training, good agents should always be sharpening their skills. I strongly recommend taking advantage of low-cost or free training opportunities.

## Rule #4. Never stop asking for help

The best free education is: Ask someone with more experience than you. Most people love to mentor and are flattered when they're asked for help.



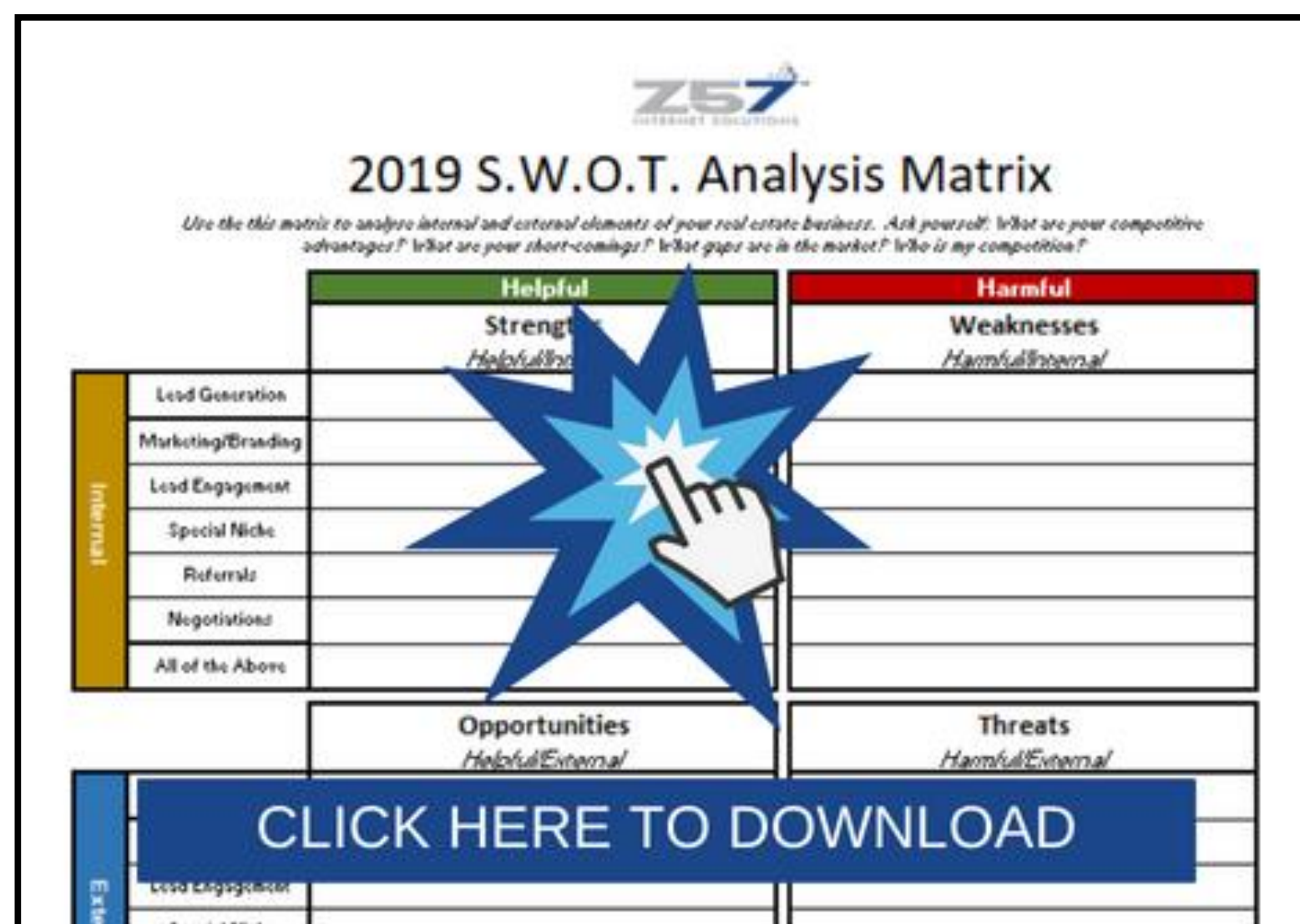


# Tool: S.W.O.T. Analysis

## Your S.W.O.T. Analysis Tool

### Benefits

If you have never completed a SWOT analysis, it's a tool for looking at your business for it's strengths, weaknesses, opportunities, and threats. It's one of the best (and no-cost) ways to step back and take an objective look at your business.



The image shows a worksheet titled "2019 S.W.O.T. Analysis Matrix" with the Z57 logo at the top. Below the title is a small instruction: "Use this matrix to analyze internal and external elements of your real estate business. Ask yourself: What are your competitive advantages? What are your short-comings? What gaps are in the market? Who is my competition?" The matrix is a 2x2 grid. The top-left quadrant is labeled "Helpful Strengths Helpful/Internal". The top-right quadrant is labeled "Harmful Weaknesses Harmful/Internal". The bottom-left quadrant is labeled "Helpful Opportunities Helpful/External". The bottom-right quadrant is labeled "Harmful Threats Harmful/External". To the left of the matrix is a vertical column labeled "Internal" with a yellow background, containing the following categories: Lead Generation, Marketing/Branding, Lead Engagement, Special Niche, Referrals, Negotiations, and All of the Above. To the right of the matrix is a vertical column labeled "External" with a blue background, containing the following categories: Lead Engagement and Special Niche. A large blue starburst graphic with a hand cursor pointing to it is overlaid on the "Strengths" quadrant. At the bottom of the matrix is a blue button that says "CLICK HERE TO DOWNLOAD".

### How to Use

We've created a SWOT analysis worksheet for you. Answer each question on the next two pages. Then place your answers on the sheet under each of the categories: Strengths, Weakness, Threat, Opportunity.



# Tool: S.W.O.T. Analysis

## 1. Lead Generation

- How efficient are you at being found?
- Are you generating enough leads to reach your monthly transaction target?
- How many different sources are you being found on?
- Are you generating a ROI from your efforts?
- Is this your Strength or your Weakness?
- Will this be an Opportunity or a Threat for next year?

## 2. Marketing / Branding

- Are you viewed as a Realtor or a Neighborhood Expert?
- Are you providing Value Proposition to your audience?
- Is your Marketing approach targeted or is it the blanket approach?
- Is this your Strength or your Weakness?
- Will this be an Opportunity or a Threat for next year?

## 3. Lead Engagement

- What is your number one goal when you generate a lead?
- How are you stopping the consumer search?
- How do you eliminate other search engines from the consumer process?
- What is your strategy for turning a lead into a contact?
- Is this your Strength or your Weakness?
- Will this be an Opportunity or a Threat for next year?



# Tool: S.W.O.T. Analysis

## 4. Special Niche

- Does this exist in your market?
- Which demographic are you going to target more next year?
- What is your marketing strategy for identifying your niche?
- Is this your Strength or your Weakness?
- Will this be an Opportunity or a Threat for next year?

## 5. Referrals

- What percentage of your business comes from referrals?
- What is your strategy for increasing your monthly referrals?
- How are you growing your sphere of influence?
- How do you stay relevant for your sphere of influence?
- Is this your Strength or your Weakness?
- Will this be an Opportunity or a Threat for next year?

## 6. Negotiations

- What is your Value Proposition?
- How do you currently get your audience to perceive more value in you?
- What key partners do you have that allow you to be more valuable?
- Is this your Strength or your Weakness?
- Will this be an Opportunity or a Threat for next year?

# Tool: Annual Goal Planning

## Your Annual Goal Planning Tool

### Benefits

Create a roadmap for success, stay organized, hold yourself accountable

**Z57**  
INTERNET SOLUTIONS

### Annual Goal Planning Tool

Use this tool to track your annual goals  
Remember to set S.M.A.R.T. goals (Specific, Measurable, Achievable, Relevant, Time Sensitive)

Type your annual goal below:

| Breakdown your Annual Goal into 3 Key Focus Areas and type them below: |                        |   |                        |   |                        |
|--|------------------------|---|------------------------|---|------------------------|
| 1  | Type #1 Key Focus Here | 2 | Type #2 Key Focus Here | 3 | Type #3 key Focus Here |

Break your Focus Areas into 5 smaller goals or Objectives and type them below:

| 1. Key Focus Area |                        | 2. Key Focus Area |                        | 3. Key Focus Area |                        |
|-------------------|------------------------|-------------------|------------------------|-------------------|------------------------|
| 1                 | Type Objective #1 Here | 3                 | Type Objective #3 Here | 3                 | Type Objective #3 Here |
| 2                 | Type Objective #2 Here | 4                 | Type Objective #4 Here | 4                 | Type Objective #4 Here |
| 3                 | Type Objective #3 Here | 5                 | Type Objective #5 Here | 5                 | Type Objective #5 Here |
| 4                 | Type Objective #4 Here |                   |                        |                   |                        |
| 5                 | Type Objective #5 Here |                   |                        |                   |                        |

**CLICK HERE TO DOWNLOAD**

### To use the tool, you will need to:

#### 1. Choose 1 Annual Goal

- Choose one of the following
  - Number of transactions
  - Annual sales volume
  - Annual Gross commission income

#### 2. Choose 3 Key Focus Areas to Help Reach Annual Goal

- Tasks that might require a lot of work
- Tasks that have been top of mind but haven't been done
- Items such as: agent website, implementing a CRM, hiring an admin, developing a lead gen strategy

#### 3. Choose 5 Objectives for Each Key focus Area

- Break down each focus area into 5 specific objectives
- Each objective should represent a specific action or task that can be completed
- It is key to make sure each objective ties back to each focus area



# Tool: Annual Goal Planning

## S.M.A.R.T. Goals

Standing for **s**pecific, **m**easurable, **a**chievable, **r**esults-focused, and **t**ime-bound goals, S.M.A.R.T. goals are specific and clearly defined. Each year, you should write down your S.M.A.R.T. goals to help you keep focused on your target.

## Questions to consider

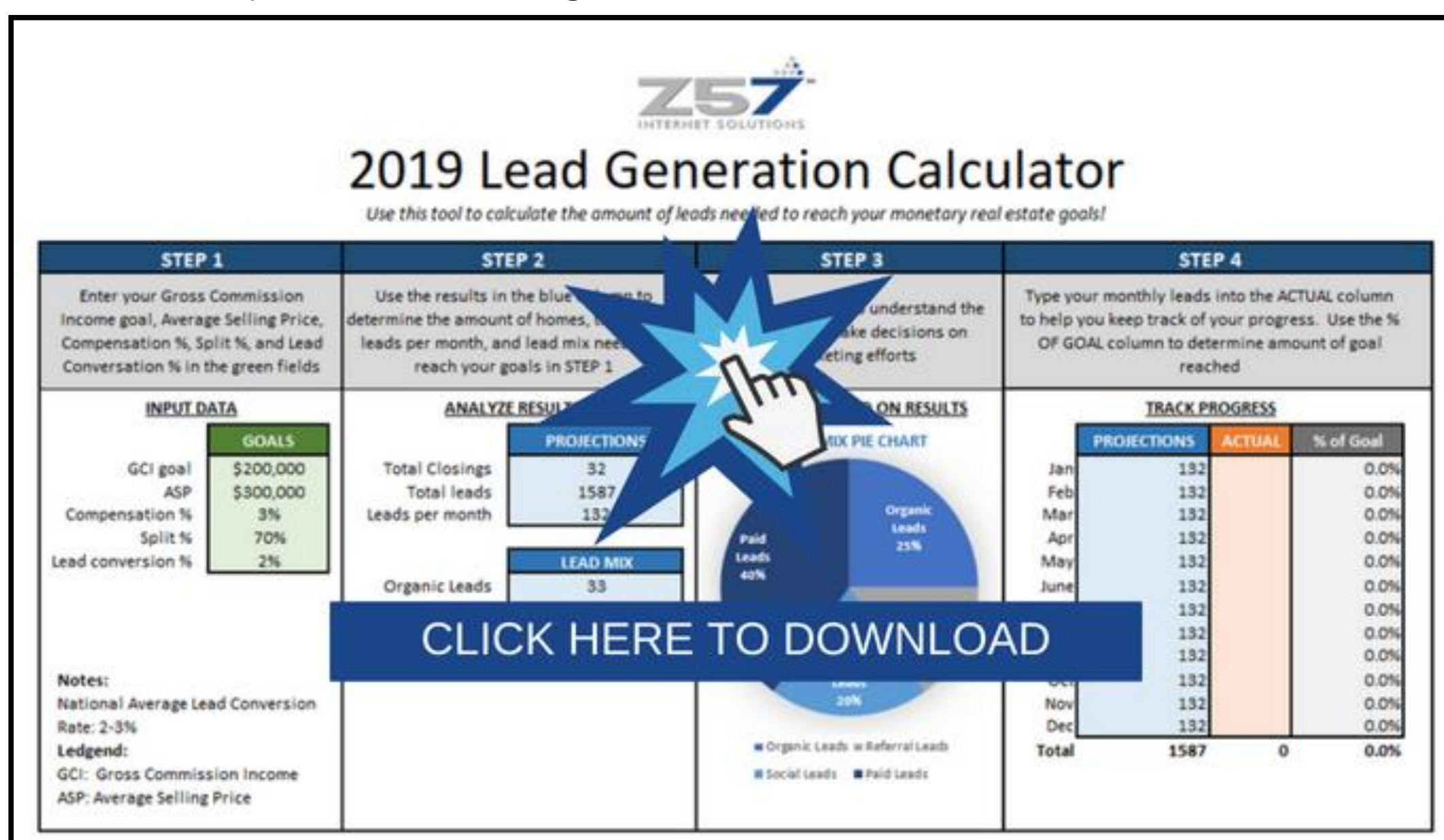
- Specific
  1. What goal will be accomplished?
  2. How will it be accomplished?
- Measurable
  1. How will you measure your results?
  2. What programs will use to track data?
- Achievable
  1. Is it possible?
  2. Have others accomplished it?
  3. Can you perform the tasks to complete the goal?
- Results-focused
  1. Why are you accomplishing this goal?
  2. What is the result of the goal?
- Time-bound
  1. What is the deadline?
  2. Does it create a sense of urgency?
  3. Is it too far way?

# Tool: Lead Generation Calculator

## Your Lead Generation Calculator Tool

### Benefits

Now that you know your annual goal, it's time to see how this breaks down into tangible numbers and lead counts. What is the total number of leads you will need to reach your income goal? Find out with this tool!



### To use the tool, you will need to:

1. Enter your GCI (Gross Commissionable Income)
2. Enter Your ASP (Average Selling Price)
3. Enter Your Comp, Split and, Lead Conversion Percentages

### Results

You will see how many home sales, total leads, and leads per month you will need to reach your goal. To break this down further, your lead mix of organic, referral, social and paid leads will also be calculated after you input the items above.



# Tool: Budget Calculator

## Budget Tool

Part of being successful in business is properly knowing and managing your living and business expenses.

## Benefits

- Know how to thrive within your means, balance work/life expenses, make realistic financial goals, help plan for your future

The screenshot shows the Z57 Budget Calculator interface. At the top, the Z57 logo and the title 'Budget Calculator' are displayed. Below the title, a subtitle reads: 'Enter each monthly expenses in the blue boxes below to help you track and manage your finances'. The interface is divided into three main columns: LIVING, BUSINESS, and INCOME. The LIVING column contains a section for 'MONTHLY LIVING EXPENSES' with a list of categories (Personal, Savings and/or Investment, Groceries and Dining Out, Gas, Car Payment, Heating/water and other Household, Entertainment, Other living expenses) and a 'TOTAL' row, each with a corresponding blue input box. The BUSINESS column contains a section for 'MONTHLY BUSINESS EXPENSES' with a list of categories (Office, Client, Marketing, Other Business Expenses) and a 'TOTAL' row, each with a corresponding blue input box. The INCOME column contains a section for 'Income' with a list of categories (Payroll Taxes, Total Est. Monthly Income, Total Monthly Expenses, Monthly Income after Tax, Monthly Disposable Income, Annual Income Needed, Estimated Annual Income, Annual Disposable Income) and a 'TOTAL' row, each with a corresponding blue input box. A large blue starburst graphic with a hand cursor pointing to it is overlaid on the BUSINESS column. Below the starburst, a blue button with white text reads 'CLICK HERE TO DOWNLOAD'.

## To use the tool, you will need to:

1. Enter your average living expenses
2. Enter your average business expenses





# Best of luck in 2019!

Interested in more strategy suggestions?  
Give our Marketing Consultants a call! We can help you get the  
most out of the New Year!

**1-800-899-8148 x5**  
**Monday - Friday**  
**Between 6:30am – 4:30pm PST**



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