

2022 SUCCESS BLUEPRINT



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www.forwardcoaching.com

SHORT TERM BUSINESS PLAN

Now - December 31st

Days Worked: _____

Hours Prospected: _____

Contact Made: _____

Appointments: _____

Listings Gone On: _____

Listings Sold: _____

Buyer Consultations: _____

Buyer Sales: _____

Price Reducations: _____

Total Pendings: _____

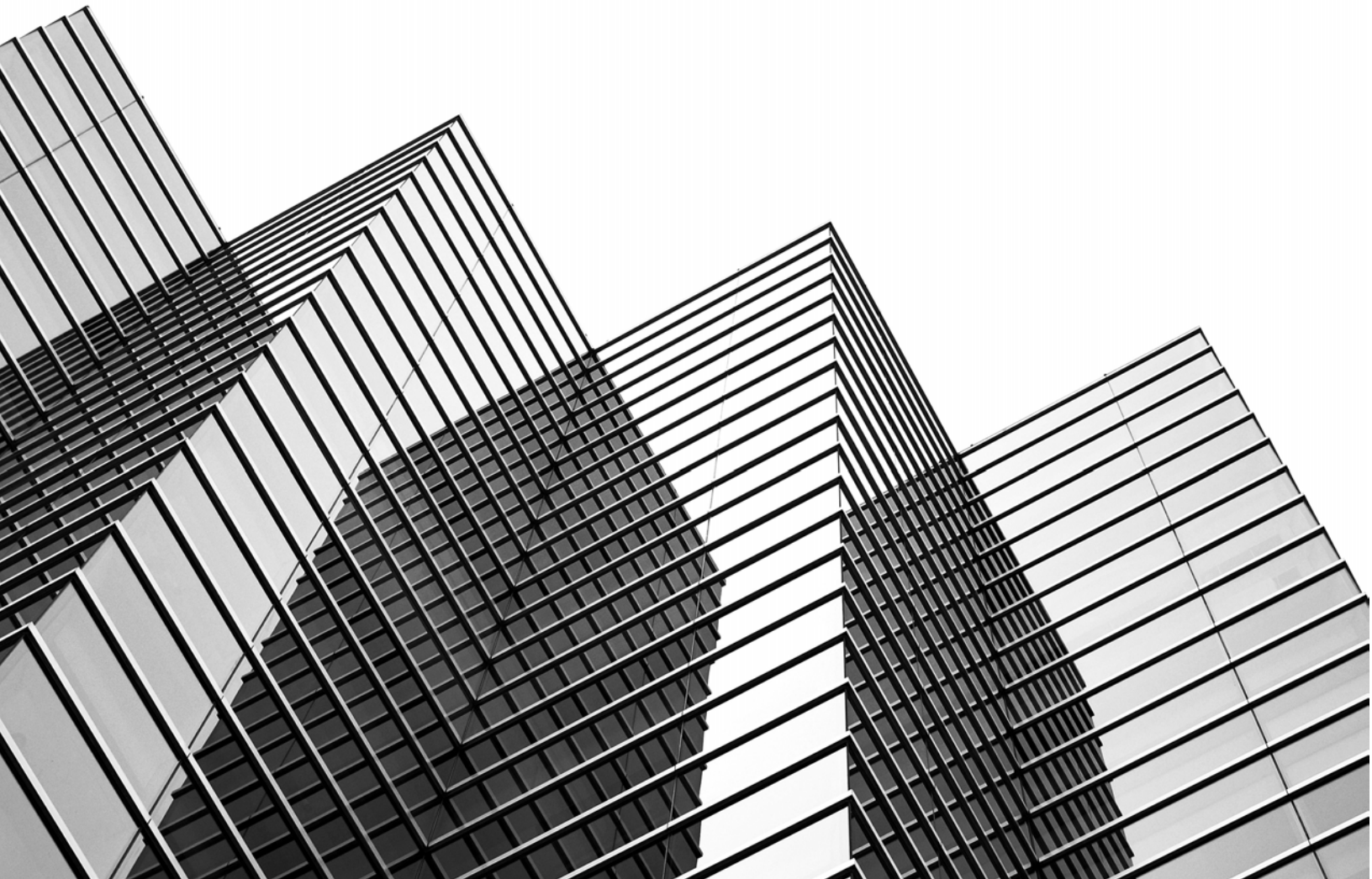
Total Active Inventory: _____

Closed Deals Within Time Frame: _____

Projects to Complete: _____

The benefits I will
receive when I
complete this plan:

2022 BUSINESS PLANNING PACKET



2022 BUSINESS PLAN

MISSION

Write out the mission statement for your business below.

VISION

Where do you envision your business in the next five years?

VALUES

List the values that are most important to you and how you demonstrate them in your business.



YOUR BIG WHY

WHAT'S YOUR BIG
"WHY"
MOTIVATING YOU TO
STRIVE FOR SUCCESS?

TRANSACTION GOALS

2021 VS 2022

| | 2021 Actuals | 2022 Goals |
|--------------------------------|--------------|------------|
| Gross Closed Commission Income | | |
| Closed Deals | | |
| Days Worked | | |
| Prospecting Hours | | |
| Total Contacts | | |
| Listing Appointments | | |
| Listings Taken | | |
| Listings Sold | | |
| Buyer Sales | | |

MONTH BY MONTH PRODUCTION PLANNER

Because some markets have very significant seasons where business may be up or down, you may want to adjust your business plan accordingly.

Projected Units Sold per Month and per Quarter

| | | | | |
|------|----------------------|-----------|----------------------|----|
| 2022 | <input type="text"/> | January | | |
| | <input type="text"/> | February | <input type="text"/> | Q1 |
| | <input type="text"/> | March | | |
| | <input type="text"/> | April | | |
| | <input type="text"/> | May | <input type="text"/> | Q2 |
| | <input type="text"/> | June | | |
| | <input type="text"/> | July | | |
| | <input type="text"/> | August | <input type="text"/> | Q3 |
| | <input type="text"/> | September | | |
| | <input type="text"/> | October | | |
| | <input type="text"/> | November | <input type="text"/> | Q4 |
| | <input type="text"/> | December | | |

10-10-10 DAILY TRACKING FORM

Your goal should be to complete 10 phone calls or face to face conversations, 10 texts, and 10 emails to generate business each day. Use the worksheet to track your results on a weekly basis.

WEEK OF

TO

| | M | T | W | TH | F | S | SU | TOTAL |
|------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Contacts* | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Emails | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Texts | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Bonus: Notecards | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

*Must be live phone calls or face to face

GOALS:

Days worked

Hours worked

Contacts made

Total listing appts.

Total listings taken

Total listings sold

Buyer sales

Total price reductions

ACTION ITEMS:

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

PROJECTS, SYSTEMS, AND OPERATIONS

Make a list of all the projects you would like to complete by the end of the year as well as any systems or processes you need to create / refine.

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

MARKETING PLAN

Let's begin by examining the areas of business you would like to give more attention.

Please rate from 1 to 5, with 5 being the highest level of importance.

1. Tele-prospecting
2. Direct mail
3. Personal referrals
4. Event marketing (consumer seminars)
5. Community / Civic volunteer work and overall participation
6. Networking
7. Contact management systems
8. Social media
9. Working with sellers
10. Working with buyers
11. Open houses
12. Just listed cards
13. Just sold cards
14. Personal promotion
15. Ratings and reviews
16. Geographical farming
17. Securing FSBO listings
18. Securing expired listings
19. Personal website
20. Door knocking communities or around listings and sales
21. Rent to own prospects

MARKETING PLAN CONTINUED

I will engage homeowners via:

- ☐ Email
- ☐ Direct Mail
- ☐ Door Knocking
- ☐ Community Events
- ☐ Local Advertising
- ☐ Social Media

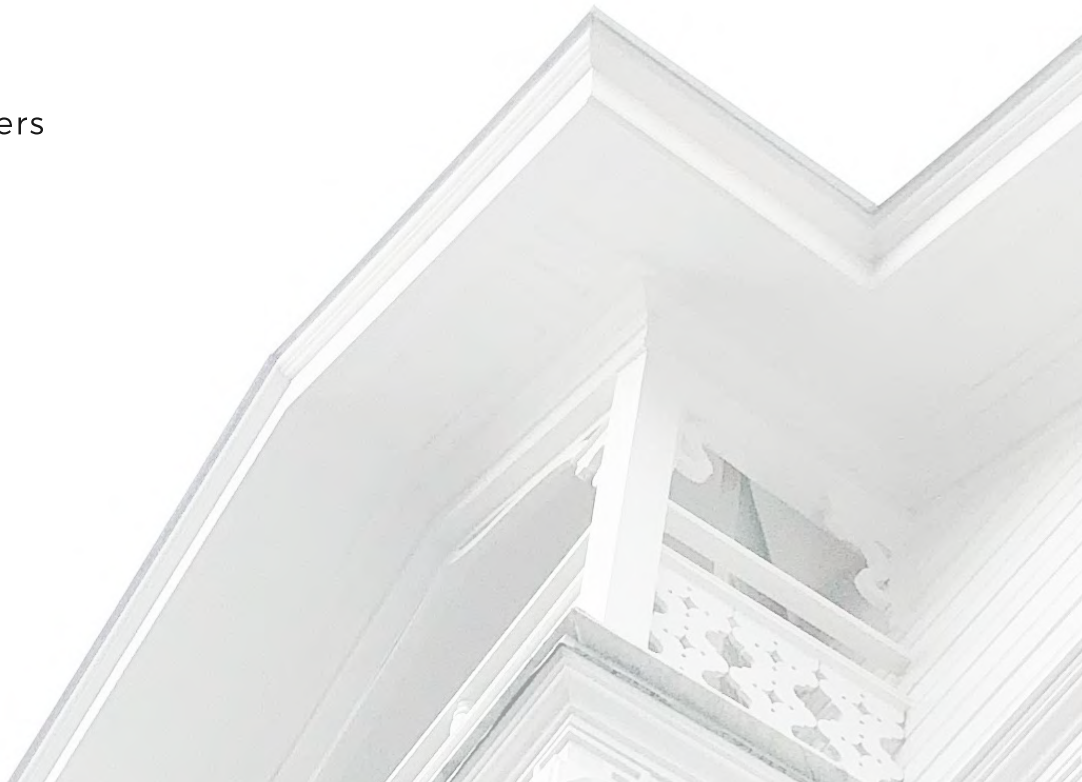
Next step: My Frequency of Engagement

I will engage this area by door knocking _____ homes _____ times per _____
(week, month, year).

I will send out _____ postcards/direct mail/just sold cards _____ times per _____.

I will mail the following info to _____ homes in each area _____ times per _____.

- Downsizing
- Moving Up
- First Time Home Buyers
- Absentee Owners
- FSBOs
- Expireds
- Divorceds
- Distresseds



MARKETING PLAN CONTINUED

I will build my community database by:

-
-
-
-

I will plan the following community events this year for the following areas:

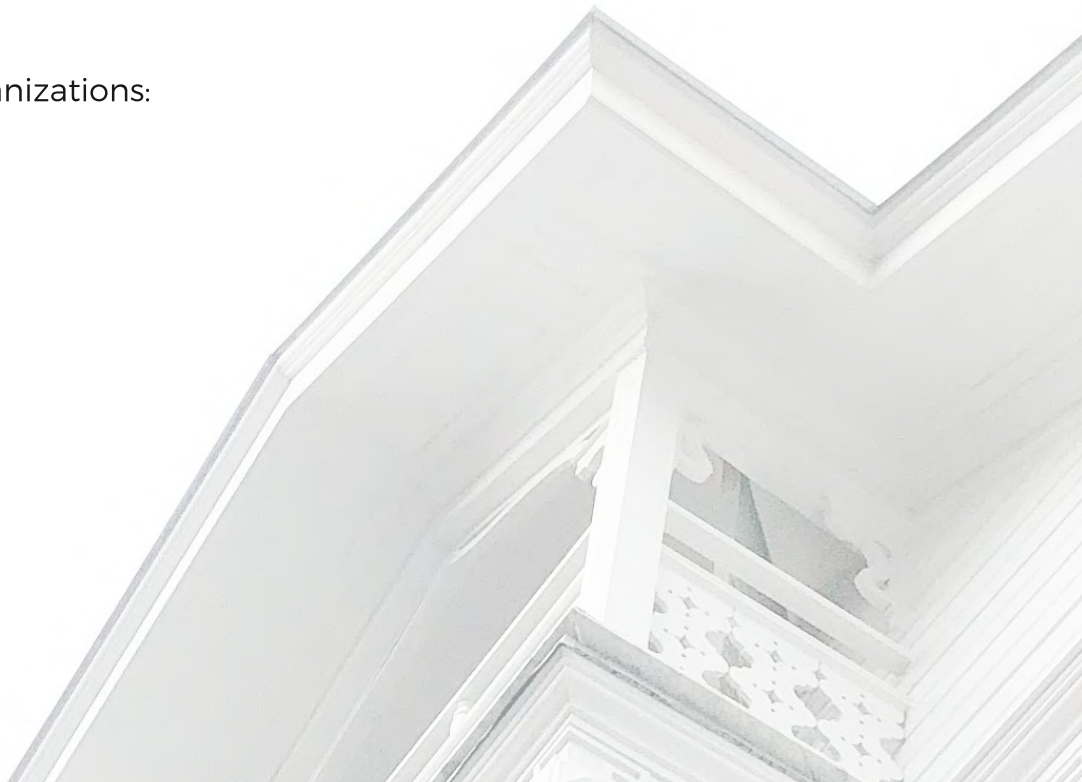
-
-
-
-

I will use the following technologies to create my web of connection:

- Text – frequency? _____
- Email – frequency? _____
-
-

I will join the following organizations:

-
-
-



MARKETING PLAN CONTINUED

What is your timeline for your launch?

What is your budget?

What pieces of the project will you be delegating to someone on your team?

What will you be responsible to do?

Have you set up a marketing calendar of when to order, when to mail and when to follow up personally on your campaigns?

SELF - SKILL EVALUATION

Score yourself on a scale of 1-10, with 10 being the best.

Time Management

10 9 8 7 6 5 4 3 2 1

Prospecting for New Business

10 9 8 7 6 5 4 3 2 1

My Buyer Conversion Process

10 9 8 7 6 5 4 3 2 1

Listing Presentations to Listings Taken Ratio

10 9 8 7 6 5 4 3 2 1

Working My Database

10 9 8 7 6 5 4 3 2 1

Working My Sphere and Past Clients for Referrals

10 9 8 7 6 5 4 3 2 1

Scripts and Objection Handlers

10 9 8 7 6 5 4 3 2 1

Market Knowledge

10 9 8 7 6 5 4 3 2 1

SELF - SKILL EVALUATION CONTINUED

Lead Follow Up

10 9 8 7 6 5 4 3 2 1

Prequalifying Buyers and Sellers 100% of the Time

10 9 8 7 6 5 4 3 2 1

Strong Listing Presentation

10 9 8 7 6 5 4 3 2 1

Negotiation Skills

10 9 8 7 6 5 4 3 2 1

Ability to Close More Than 3 Times for the Signature

10 9 8 7 6 5 4 3 2 1

Leadership

10 9 8 7 6 5 4 3 2 1

Systems and Processes to Run an Efficient Business

10 9 8 7 6 5 4 3 2 1

My Money and Profit Management

10 9 8 7 6 5 4 3 2 1

Thinking Big and Mindset

10 9 8 7 6 5 4 3 2 1

NET WORTH TRACKER



REALITY STEP 1: EXPENSES

REQUIRED MONTHLY EXPENSES

Mortgage/Rent

Water/Power/Garbage

Internet/Cable/Cell

Repairs

Debt & Loans

Auto Payment

Car Insurance

Other Transportation

Gas/ Oil Change

Groceries

Insurance

Medicine

Essentials

Pets

OPTIONAL MONTHLY EXPENSES

Entertainment

Dinners/Lunches

Hobbies

Vacation/Travel

Subscriptions

Clothing

Big Purchases

Charity/Church

Savings/401(k)

Education

Books

Other

Other

Other

REALITY STEP 1: EXPENSES CONTINUED

REQUIRED MONTHLY EXPENSES

Other

Other

Other

Other

Other

Required Total \$

x 12

Required Annual \$

Annual Expenses

(Required Annual + Optional Annual)

OPTIONAL MONTHLY EXPENSES

Other

Other

Other

Other

Other

Optional Total \$

x 12

Optional Annual \$

= \$

REALITY STEP 2: DEBT

MONTHLY

TOTAL

Credit Cards

1.

2.

Auto Loans

1.

2.

Student Loans

1.

2.

Lines of Credit

1.

2.

Real Estate

1.

2.

Other Loans
& Debt

1.

2.

IRS

1.

2.

TOTAL MONTHLY = \$

TOTAL = \$

REALITY STEP 3: INCOME

MONTHLY

TOTAL

Annual Salary

1. _____

Other Income

1. _____

2. _____

3. _____

Business Profits

1. _____

2. _____

3. _____

Rents

1. _____

2. _____

3. _____

4. _____

Investments/
Dividends

1. _____

2. _____

Loans/ Interest
Paid

1. _____

2. _____

3. _____

TOTAL = \$

REALITY STEP 4: NET WORTH

ASSETS

Cash

Savings

Checking

Bonds/ CDs

Life Insurance
Cash Value

Annuities
(surrender value)

TOTAL = \$

INVESTMENTS

Brokerage
Accounts

Mutual Fund
Accounts

Personally Held
Stocks/ Bonds

Other

Real Estate (non-
owner occ.)

TOTAL = \$

REALITY STEP 4: NET WORTH CONTINUED

RETIREMENT ACCOUNT

| | |
|------------------------------|-------|
| SEP IRA | _____ |
| Traditional/ Rollover IRA | _____ |
| 401(k)/ 403(b), etc. | _____ |
| Profit Sharing | _____ |
| Pensions | _____ |

TOTAL = \$

OTHER ASSETS

| | |
|--------------------------|-------|
| Primary Home | _____ |
| Autos | _____ |
| Jewelry/ Metals/ Gems | _____ |
| Collectibles | _____ |
| Furnishings/ Art | _____ |
| Other | _____ |

TOTAL = \$

TOTAL ASSETS = \$

(Assets + Investments + Retirement Account + Other Assets)

REALITY STEP 4: NET WORTH CONTINUED

LIABILITIES

Mortgage

Auto Loans

Credit Card
Balance

Student Loans

Back Taxes Owed

Home Equity

Lines of Credit

Investment Debt

Mutual Fund
Accounts

Business Debt

TOTAL = \$

NET WORTH = \$
(Assets - Liabilities)

REALITY STEP 4: NET WORTH CONTINUED

How do I feel about this?

What am I surprised by?

What do I need to focus on?

BUCKETS OF WEALTH



The income I will earn in the new year:

Net to me before taxes and expenses:

1. My personal annual expenses:

2. My annual business expenses:

3. Estimated annual taxes:

4. Leftover profit:

5. What I will do with the profit:

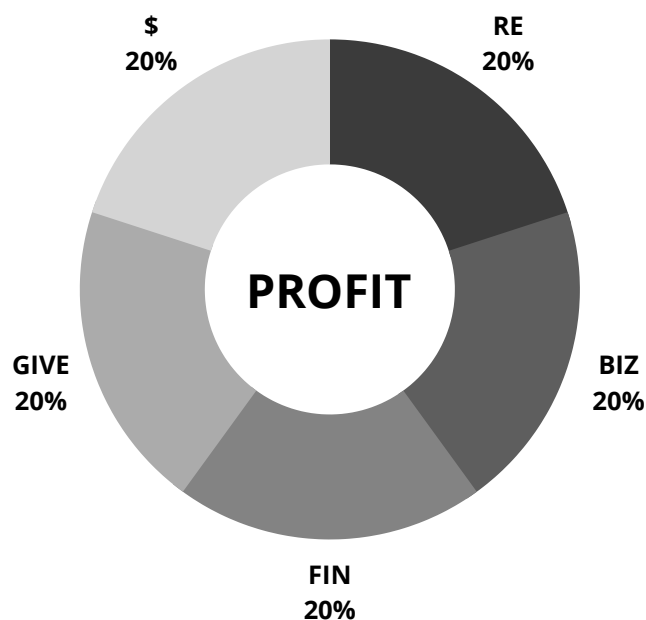
1. Liquid reserves

2. Real estate investments

3. Start, own, buy, invest in businesses

4. Leverage financial instruments

5. Create a legacy / help family / pay off debt / be generous



MONTHLY VISIT: YOUR MONEY CHECKLIST

1. Review pending pipeline
2. Review listings and potential income from their sale
3. Money / cash on hand / reserves
4. Review credit card purchases and big expenditures from the previous month
5. Review status of investments / rentals
6. What big expenses or purchases are coming in the next month?
7. What taxes are due in the next month?
8. Review new projects and promotions and their cost vs. results
9. Review marketing expenses and results
10. What money management activities do I need to do in the next month?
(Example: meet with accountant, raise rents, switch insurance brokers)

In addition, track your net worth quarterly!

FORWARD PRIVATE COACHING PROGRAMS

**IF YOU'RE READY TO FIND OUT
HOW COACHING CAN MOVE YOUR
LIFE, BUSINESS, AND FINANCES
FORWARD REQUEST A
COMPLIMENTARY BUSINESS
STRATEGY BY SCANNING THE QR
CODE:**



GROWTH \$800 PER MONTH

- 24 one-on-one (30 minute) calls annually - 2 per month
- Weekly Tuesday Group Coaching Calls
- Consumer centric lead generation kits
- Pre-Recorded Training Topics released on Mondays to Member website to watch On- Demand
- Weekly Thursday Q&A Session with Debbie & Marketing Guru Pete Mitchell to answer your marketing or technology questions
- Annual business planning clinic (virtual event with Debbie and Ben)
- Membership in our referral network and private Facebook group
- Access to the Forward Coaching members website & resources
- Discounts on software, Virtual Assistants and other services
- Coach on demand - access to your coach for questions you have in between your calls
- Complimentary Brivity CRM and transaction management (\$1,600 yearly value)
- Discounts on Fast Forward Courses
- Complimentary Admission to Forward Coaching Events

ACCELERATE \$1500 PER MONTH

- 48 one-on-one (30 minute) calls annually - 4 per month
- Weekly Tuesday Group Coaching Calls
- Consumer centric lead generation kits
- Pre-Recorded Training Topics released on Mondays to Member website to watch On- Demand
- Weekly Thursday Q&A Session with Debbie & Marketing Guru Pete Mitchell to answer your marketing or technology questions
- Annual business planning clinic (virtual event with Debbie and Ben) Membership in our referral network and private Facebook group
- Access to the Forward Coaching members website & resources for you and up to 20 team members
- Discounts on software, Virtual Assistants and other services
- Coach on demand - access to your coach for questions you have in between your calls
- Complimentary Brivity CRM and transaction management (\$1,600 yearly value)
- Discounts on Fast Forward Courses
- Complimentary Admission to Forward Coaching Events

**NO CONTRACTS
REQUIRED**

REAL PEOPLE, AMAZING RESULTS!



I have found great value in being trained by my coach at Forward Coaching. In the past year my business has grown exponentially, and I know that it is a direct result of the weekly training, resources, group calls, and one-on-one coaching calls that I take part in. In addition to holding me accountable, my coach pushes me to expand my thought processes in terms of growing my business.

Furthermore, there are also a great deal of resources that Forward Coaching students have access to on a daily basis such as the monthly newsletter, scripts, recorded training sessions, and past interviews that are very helpful especially since we have the ability to replay them as often as needed. ***Because of my continued growth as a student at Forward Coaching I am not only expanding my team locally, but I am in the process of adding teams in Northern California, Nevada, as well as Massachusetts. Making the move to Forward Coaching was the best decision I could have made.***

*Robert Barksdale
Realty One Group West, Corona, CA*



In a long executive career, I've benefitted repeatedly from excellent coaches and mentors. So, when creating a luxury real estate practice and brand, I knew already that I'd need a coach with deep expertise, especially in luxury. That resource proved very hard to find. Finding a coach who could challenge and sharpen my thinking about strategy and strategic decisions was much, much harder. So, I'm grateful to have gotten introduced to Forward Coaching. There's no question that the quality of insight and the willingness to challenge me has proven very valuable. Many Realtors® told me that launching directly into luxury simply wasn't how this is done, if even possible to do at all. My experience is proving that wrong, and I'm grateful. And my coach has consistently helped shape and then reinforce the good strategic decisions and actions that are producing great results. ***My investment with Forward Coaching is already being repaid in 10X multiples or more.*** My advice if you're considering working with a Forward Coaching coach? Simple: Do it, and don't look back. It's likely to be the very best decision you've made in a long, long time.

*Wayne Peterson
Keller Williams Realty, Sandpoint, ID*



Within my first few weeks of coaching, I had my first five listing lead opening house. My coach prompted me to put my pre-listing packets as the number one top priority for immediate follow up, and encourage me to keep them simple, pre-assembled, so that this moment of five leads would never again be an obstacle. I found myself relying too heavily on old expectations, old experience. I took four days to perfect my pre-listing packets. That's a problem. I dropped all five, followed up, only to receive a callback on the first one indicating they had just listed that day

So, I literally discovered my pre-listing packet on the kitchen counter, images on the MLS. Victor's experience kept me in the game, boiled it down very succinctly, and offered me key learning I would have never achieved anywhere else.

Taking four days on a representation I felt suitable of my marketing background, cost me roughly \$30,000. My coach has a way of identifying leaks, reaching beyond my surface layer, digging deep, and making sure that I clearly understand what's going on at each hurdle. With that said, I am now beyond having the pre-listing packets ready to go at any moment. I'm building for the win.

Together, I was easily able to step in when this home expired, and I'm working today on closing a great property for great new clients, and with my pre-listing packets together and ready to go and understanding that that is critical money on the table, that's something I do every open house. Gross commission involved here is \$33,000 after my net. **It's a near 450% return on my coaching investment.** Thank you, Debbie and the team, for allowing me the opportunity to see and understand in deeper ways than ever.

Nicolle Davis

Berkshire Hathaway HomeServices California Properties, Covina, CA

After 1 year of coaching, I have surpassed any income that I have ever made, ever and I have been in the business for 18 years! The main reason for me thriving during a pandemic year, which is incredible of itself, was the style and technique of the coaching. One of the things that I totally appreciate is that she meets the clients where they are rather than pushing them into something that they are not familiar with; for example, she may have a goal for you but instead of forcing you down a path, she gently guides you in a direction without you even realizing it. I made a statement this past fall, "I hate listings" which took her back for a moment and said "Ok, ok but perhaps we can try something like this..." and I said that I would try and develop this skill. I have tried and now I'm starting 2021 with 8 listings! This is amazing because that is more than I have ever had before at once!



Another thing that I really appreciate and really enjoy is that it is not a cookie cutter program where the coaches cut / paste the plan for the clients across the board, she asks questions and opens up the dialogue for discussion, then recommends where there might be a gap that needs to be filled with, "have you ever thought about trying this..." We may start off the dialogue with one thing and actually get to a point that I didn't think about before, but I feel like it really speaks to me and my business.

Martha Lebron-Dykeman

Berkshire Hathaway HomeServices First Realty, Des Moines, IA