

The 12 Month Business Plan For Sales People 2017

Name:

Company:

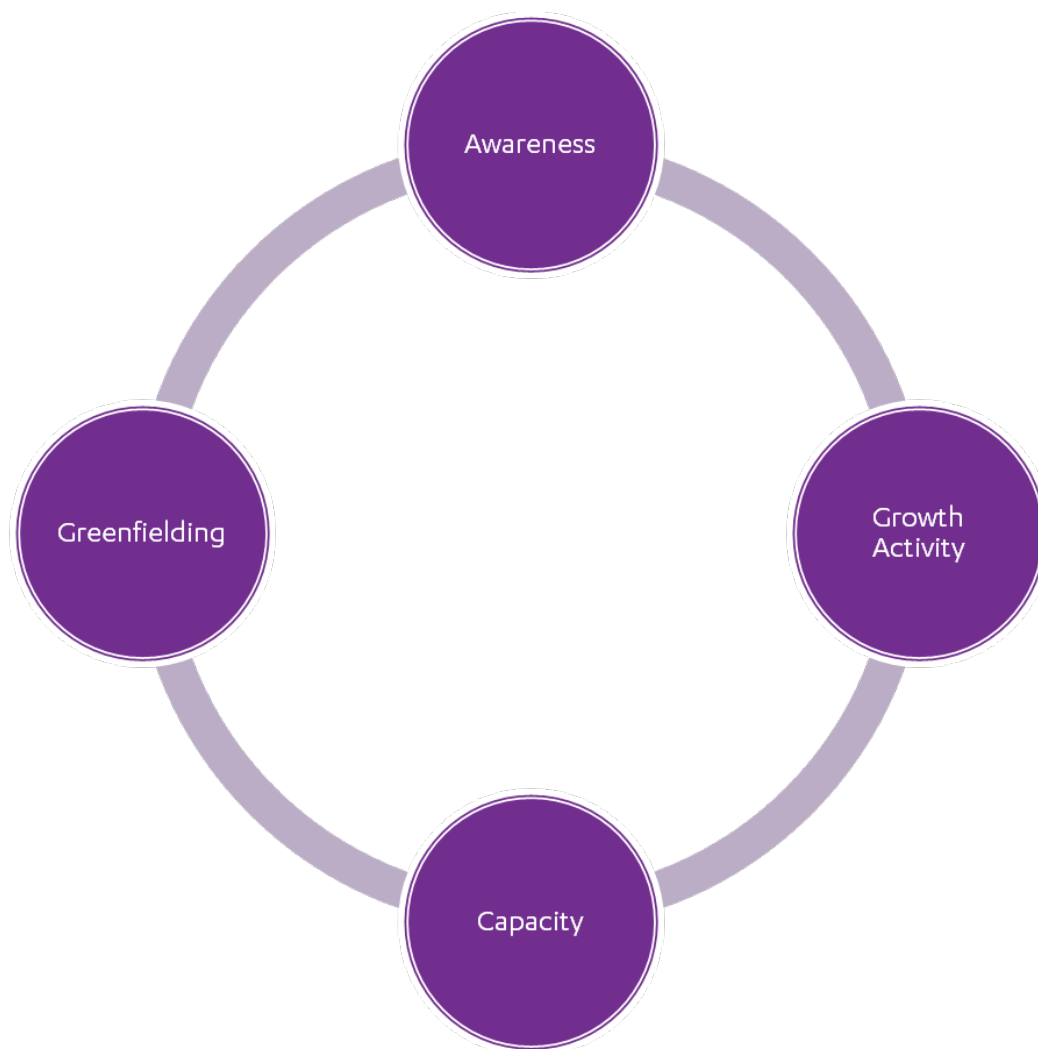
Date:

Signature:

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Awareness



Last Year

What went well for me?

What did I struggle with?

What was going on for me personally?

What was going on for me at work?

Facts

Listings Taken:

Listings sold

Settled \$

Think about it...

Become aware of the edges of your thinking



What are the optimum circumstances for me to enjoy my life:

Luxury items for me in any week would be:

Know your numbers

There are factors or realities within each market and salespeople must know what they are and take them into account if they are to succeed.

- a) Median sale
- b) Difference between list and sell
- c) Average time it takes to sell a home
- d) Turnover in your market
- e) Number of sales each month
- f) Number of salespeople
- g) Number of listings
- h) Change in market over the last 3 months
- i) Change in the market over the last 12 months
- j) Number of houses in your area

Know your market characteristics

Awareness of:

- Exclusive or not?
- What is the amount of auction being run?
- Are you in a buyers' or sellers' market right now?
- Is vendor investment marketing being offered. If not why?
- Are you doing conjunctions - who with? why? should you?
What happens if you stopped? Probably nothing but you would/could upset your opposition.
- What is the attitude of your main opposition and how do you cope with that, match it, walk away from it, or let it be.
- Open days are they run. If so, is that part of your strategy or not.
- What if they are not run and you do run them?
- What are the other characteristics of your market place right now?

Here we are looking for strategic advantage.

The difference in your approach to the market.

Anything that will stand out.

Financial Performance Analysis

	Last Year	This Year (Goal)
(a) No of sales made =	(a)	
(b) Commission earned =	(b)	
(c) Therefore average commission b/a =	(c)	
My financial goal for 2017 is =		\$
Divided by the average commission (c) gives you the listings you need to sell (d)		(d)
Multiplied by 2 gives the units you need to do (Listing / Selling) =		
Divided by 12 gives the units you need to do each month =		
Go back over the last year's listings and work out your strike rate (Sales made ÷ by Listings Taken x100) = % (e)	(e)	

You sell (e) ____ % of your listings.

Therefore you need to list $D \div E \times 100$ ____ (Numer of listings)

LIST AND SELLS REQUIRED = ____ THIS YEAR

WHICH = ____ A MONTH

I sell ____ % of my listings monthly

My new capacity for listings must be _____

My Numbers

Listings required each month _____

% listing presentation to listings taken _____
(Presume 2 potentials per 100 proactive events:
phone calls, cards dropped, call backs and 1
converted) No calls required: _____

Calls per day _____

My current listing base _____

% of my listings base I need to sell each month _____

Listing base required for \$ _____

Goal Setting

Where do I want to go? What do I want to do?

Personal Growth	Things	Finance
Fitness		
Food		
Stress		

Top Three

Personal Growth	Things	Finance

Why I need them?

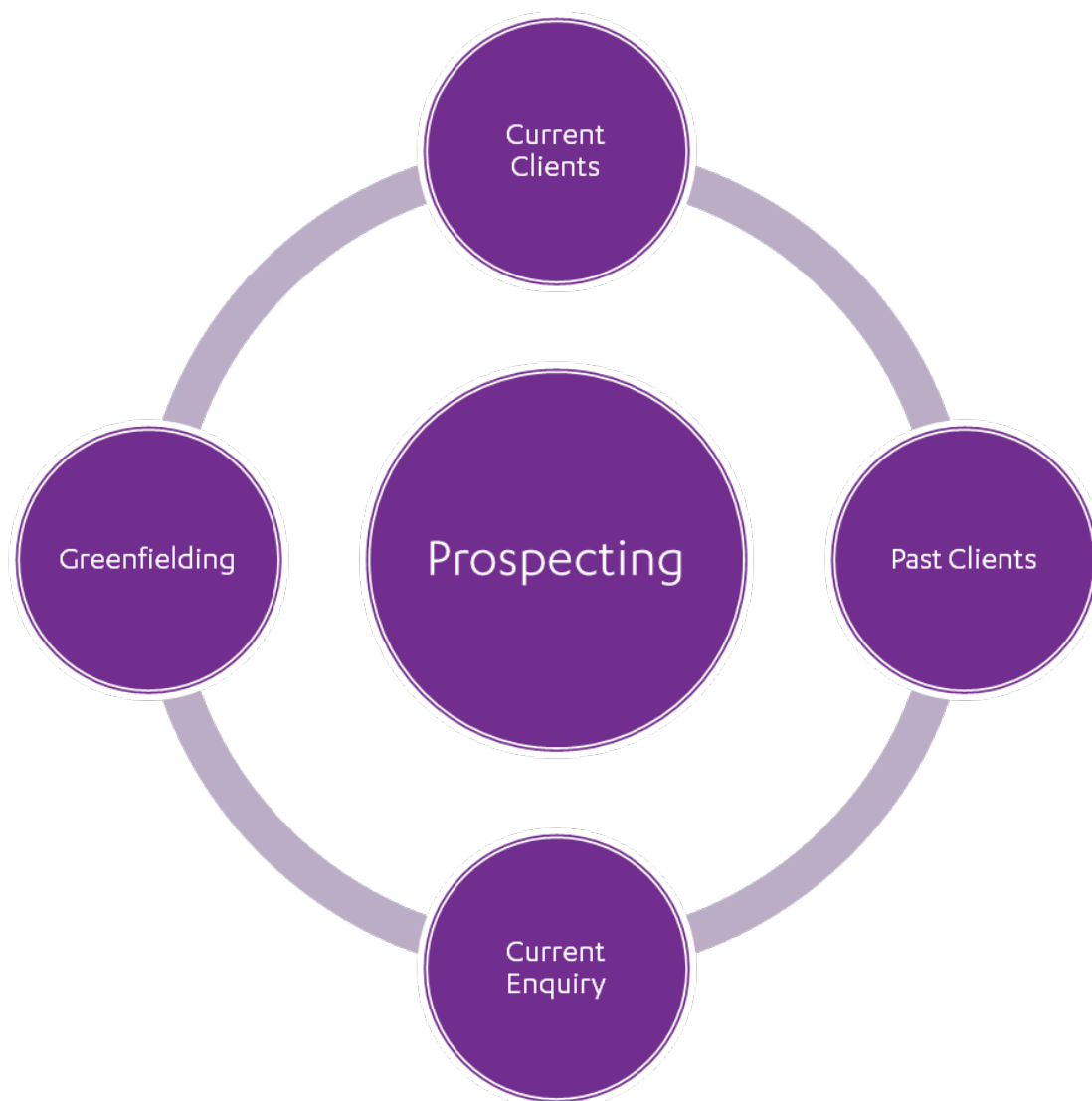
Personal Growth	Things	Finance
1.	1.	1.
2.	2.	2.
3.	3.	3.

Growth Activity

Current listing base:

Required:

Prospecting



Current Clients:

Customer Service

First Contact	
• Pre-Listing Kit	
First Visit	
• Thank-You note	
Presentation	
• Send gift now	
Each open day	
• Pre-auction	
After auction and sale	
• Prior to possession	
On possession day	
• After possession	
Onto database	

Past Clients:

Pro-active Prospecting

There are so many ways to do this. I am not here to teach you other than let you see what is needed for you to progress.

Client Base

Currently I have _____ Clients on my Client base

My Client base is divided into:

	Done	To Be Done
Advocates	☐	☐
AAA	☐	☐
AA	☐	☐
A	☐	☐
Vendors	☐	☐
Buyers	☐	☐
Farm Area	☐	☐
I currently have a 12 month plan	☐	☐
I have to organise _____ mail outs a year	☐	☐
I have done a booster with the last twelve months	☐	☐

Ideas for this year for me are:

	Done	To Be Done
I write to/call 5 clients per day off my list	☐	☐

Existing Enquiry

	Done	To Be Done
I have the call forward system (CFS) in place	☐	☐
I have the scripts to call 4-5 times to the same people	☐	☐
I have a system for getting oppositions listings into my CFS	☐	☐
All buers are divided into Buyers and Sellers	☐	☐
I have prospective calls designated in my 7 day plan (min 2hrs a day)	☐	☐
I have the reverse directory sorted	☐	☐
My prospecting is no longer "beggy" or "braggy"	☐	☐
My prospecting is based on the 4GA principle	☐	☐

Greenfielding

Prospecting to people unknown to you!

Profile and Promotion

1. Profile

	Done	To Be Done
I have a one page flier / profile on me	☐	☐
I have a larger profile with my referee's, etc	☐	☐
My card is just how I want it	☐	☐
I have a system for posting personalized notes	☐	☐
I have my own stationary with my photo	☐	☐
My signs have my photo on them	☐	☐
My ads in the paper have my photo on them (where appropriate)	☐	☐
I have a clear understanding of why someone should list with me and it is reflected in my profile material	☐	☐
My 50/50 system is personalized to me	☐	☐
My positioning statement is clear	☐	☐
Note to do's on planning schedule		

2. Self Promotion

I will plan to invest \$ ____ on promoting me	☐	☐
Advertising: I am doing the following:		
Colour publication	☐	☐
Newspaper	☐	☐
Local papers	☐	☐
Local institution	☐	☐
Client base	☐	☐
T.V	☐	☐
Radio	☐	☐
Billboard	☐	☐

Farming

	Done	To Be Done
I am allocated a farming area	☐	☐
There are _____ homes in it		
I have a letterbox drop plan in place for the year	☐	☐
I have a door knocking schedule in place	☐	☐
I have a drive-by plan in place	☐	☐
I have a list of commercial premises / schools and institutions	☐	☐
I know the vacant land, investment flats in the area	☐	☐
I have my contacts in the area on my client base	☐	☐

The Listing Presentation

My pre-listing kit contains:

- My profile
- Co profile
- Market info
- Glossary of terms
- Making the right choices video
- References

Put anything you need to set up or do into the planning schedule at the back of this planner.

I have a customized presentation in place

I can have it ready within 2 hours

I have a systemilised pre-listing kit ready to go at all times

It covers the following:

The market we are in

Pricing

Market plans

Demonstration adds

Prices

Why someone should list with my Company

Why someone should list with me

Ways to improve salability

Marketing assistance form

Customer Service System

Authority

I always set the rules at the end of each presentation

I have a listing kit that contains the following:

Dummy Presentation

Statistics

Video on pricing

Video on Auction

Booklets on selling

Example adds

Example fliers

My profile – short plus long

Paperwork to list

Authorities

Blank sheets of paper

Wide tip pens for diagrams

Done

To Be Done

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Knowledge Appraisal

Ask yourself how well you know these modules (10- is I know it 100%)

Simply a way to find out what your knowledge plan could be for the next 90 days, 1 year.

My market	1	2	3	4	5	6	7	8	9	10
My City/Town	1	2	3	4	5	6	7	8	9	10
Methods of marketing - Why - How - Objections	1	2	3	4	5	6	7	8	9	10
Tender	1	2	3	4	5	6	7	8	9	10
Auction	1	2	3	4	5	6	7	8	9	10
By negotiation	1	2	3	4	5	6	7	8	9	10
Price	1	2	3	4	5	6	7	8	9	10
Pricing generally	1	2	3	4	5	6	7	8	9	10
Theory	1	2	3	4	5	6	7	8	9	10
How to present	1	2	3	4	5	6	7	8	9	10
Getting price corrections	1	2	3	4	5	6	7	8	9	10
Marketing plans	1	2	3	4	5	6	7	8	9	10
Vendor investment	1	2	3	4	5	6	7	8	9	10
All options presented?	1	2	3	4	5	6	7	8	9	10
Why someone should list with me	1	2	3	4	5	6	7	8	9	10
Why someone should list with my company	1	2	3	4	5	6	7	8	9	10
Extending listings	1	2	3	4	5	6	7	8	9	10
Negotiation	1	2	3	4	5	6	7	8	9	10
Time management	1	2	3	4	5	6	7	8	9	10
Your confidence with vendors	1	2	3	4	5	6	7	8	9	10

My capacity of number of listings held is _____

I need to upskill in the following subjects:	Who will help:

Accountability Coaching

I need to do:

- ☐ Daily
- ☐ Weekly
- ☐ Monthly Accountability Sheets

I need to do:

- ☐ Daily
- ☐ Weekly
- ☐ Monthly One on Ones

I am accountable to:

I need coaching in:

Budget for Business Plan

My income goal for 2017 is	\$
Personal Promotion	
Letter box drops _____ at \$_____	\$
Postcards 1000 _____ at \$_____	\$
Personal email heading	\$
Photography	\$
Past clients	
Xmas	\$
Easter	\$
Mid-Winter	\$
Valentine's Day	\$
Other	\$
Any other personal promotion	
Signs	\$
Photos	\$
Profile	\$
Advertisements	\$
Farm Area	
Letter box drops _____ at \$_____	\$
Promotions throughout the year	\$
Other	\$
Training/Coaching	
Seminars	\$
Flights	\$
Training	\$
Books	\$
Personal Assistance	
hours = _____ at \$_____ = \$_____ per week	
by 52 weeks=	\$
Bonuses Paid	\$
Cell Phone \$_____ month x 12=	\$
Car \$_____ month x 12=	\$
Petrol \$_____ month x 12=	\$
Total budget=	\$
or _____% of income goal	
Total of income over expenses=	\$

	Presentations		Listings		Sales		Commission (Actual \$ paid)	
	Target	Actual	Target	Actual	Target	Actual	Target	Actual
Jan								
Feb								
Mar								
1 st Quarter								
Year so far								

	Presentations		Listings		Sales		Commission (Actual \$ paid)	
	Target	Actual	Target	Actual	Target	Actual	Target	Actual
Apr								
May								
Jun								
2 nd Quarter								
Year so far								

	Presentations		Listings		Sales		Commission (Actual \$ paid)	
	Target	Actual	Target	Actual	Target	Actual	Target	Actual
Jul								
Aug								
Sep								
3 rd Quarter								
Year so far								

	Presentations		Listings		Sales		Commission (Actual \$ paid)	
	Target	Actual	Target	Actual	Target	Actual	Target	Actual
Oct								
Nov								
Dec								
4 th Quarter								
Year Total								

Daily Sheet

Calls to new prospects

1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40
41	42	43	44	45	46	47	48	49	50
51	52	53	54	55	56	57	58	59	60
61	62	63	64	65	66	67	68	69	70
71	72	73	74	75	76	77	78	79	80

Call to past clients

1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40
41	42	43	44	45	46	47	48	49	50
51	52	53	54	55	56	57	58	59	60
61	62	63	64	65	66	67	68	69	70
71	72	73	74	75	76	77	78	79	80

Calls to buyers

1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40
41	42	43	44	45	46	47	48	49	50
51	52	53	54	55	56	57	58	59	60
61	62	63	64	65	66	67	68	69	70
71	72	73	74	75	76	77	78	79	80

Personal notes to client base (per day)

1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20

The Weekly Planner

Mon		Tue		Wed		Thur		Fri		Sat		Sun	
8:00		8:00		8:00		8:00		8:00		8:00		8:00	
8:30		8:30		8:30		8:30		8:30		8:30		8:30	
9:00		9:00		9:00		9:00		9:00		9:00		9:00	
9:30		9:30		9:30		9:30		9:30		9:30		9:30	
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11:00		11:00		11:00		11:00		11:00		11:00		11:00	
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12:00		12:00		12:00		12:00		12:00		12:00		12:00	
12:30		12:30		12:30		12:30		12:30		12:30		12:30	
1:00		1:00		1:00		1:00		1:00		1:00		1:00	
1:30		1:30		1:30		1:30		1:30		1:30		1:30	
2:00		2:00		2:00		2:00		2:00		2:00		2:00	
2:30		2:30		2:30		2:30		2:30		2:30		2:30	
3:00		3:00		3:00		3:00		3:00		3:00		3:00	
3:30		3:30		3:30		3:30		3:30		3:30		3:30	
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6:00		6:00		6:00		6:00		6:00		6:00		6:00	
6:30		6:30		6:30		6:30		6:30		6:30		6:30	
Evening		Evening		Evening		Evening		Evening		Evening		Evening	

2017 Year Planner

[illegible]

Planning Schedule

[illegible]

Planning Schedule

[illegible]

Planning Schedule

[illegible]

Get in touch

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**A mind that is
stretched by a new
experience can never
go back to its old
dimensions**