

Sales Associate Business Planning Guide

Real estate professionals agree that making the most effective use of your time— focusing your energies on activities and resources that produce results— is critical to long-term success.

A well-thought-out business plan will help you stay focused on your goals and on activities that will achieve them.

This business planning guide will provide you with a step-by-step process designed to increase your sales success.



TUCKER UNIVERSITY

Step 1

Where Do I
Want To Be?

In Step 1, you will list your goals for the upcoming year— **you decide where you want to be and how you get there.** Will it be more units sold? A higher average sales price? A change in your “listings sold” or “sales” mix? It’s up to you.

Projected Goals

- A. Total Sales \$ Volume _____
divided by
- B. Total Number of Units _____
equals
- C. Average Sales Price _____

Source of Business

Listings Sold (Number of Units) _____

Sales (Number of Units) _____

% Referrals _____

% New Customers _____

Total

100%

Step 2 Sales Activities

Complete steps 2 and 3 to get in touch with what's producing results for you and ideas that can boost your production.

Listed on the following two pages are some key sales activities used by top producers. Go through the list and check (✓) those activities that are producing good sales results for you. Then ask yourself whether you are using these activities often enough. Are there some activities you could be using to produce more results? Check (✓) those too! Do you need to learn more about these activities or use them more effectively? By thoughtfully answering these questions, you will begin to see ways that you can boost your production.

Prospecting	Produces Good Results	Activity Frequently Used	Activity Rarely Used	Could Produce Good Results	Activity I Need To Learn or Improve
Direct Mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Face-to Face Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Referrals/Follow-Up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal Promotion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telemarketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Networking <small>Facebook, Twitter, etc.</small>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Listing Properties	Produces Good Results	Activity Frequently Used	Activity Rarely Used	Could Produce Good Results	Activity I Need To Learn or Improve
Sphere of Influence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
For Sale by Owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expired Listings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Direct Mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Networking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Farming	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Referrals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Market around Sold Listings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Market around Just Listed Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Selling Properties

Showing Homes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Qualifying Buyers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open Houses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buyer/Seller Seminars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Referrals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Apartment Mailings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Follow-Up

Personal Note	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Face-to-Face Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-Mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Step 3

Sales Tools

What tools and resources are you using today to drive your key sales activities? Here are some tools that top producers use. Put an (✓) by those that you're using or should use to better implement the key sales activities you've identified in Step 2.

	Use Currently	Should Use	Need To Investigate
Distribute 5 Business Cards Daily	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use a Personal Brochure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Door Hangers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Send Newsletters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Send Postcards (Weekly/Monthly)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Send 5 Personal Notes Daily	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Car Signs/License Plates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Always Wear Real Estate Name Badge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Sign Riders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Loan Officer to Prepare Buyers for the Loan Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Networking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact by Phone 5 Past Clients Daily	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Use Currently	Should Use	Need To Investigate
Partner with your Tucker Mortgage Representative to Conduct a Home/Buyer/Seller Seminar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mail Calendars or Other Specialty Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fully Automate Business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Software to Manage Client Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Listen to Webinars to Improve My Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hold a Customer Appreciation Party	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use a Structured Listing Presentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tucker University Training Classes attend at least one a month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CRS, CRB, GRI Training Classes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hire an Assistant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Read books or listen to tapes on on personal development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Step 4

Business Plan

You are now ready to create your business plan. In doing so, you will draw from your answers in Step 2 or 3. First, go back to Step 2 and select three activities that you want to focus on to increase your production. These could be activities that produce results for you now, but you want to do more often or do better. Or they could be new activities that you haven't used before and need to learn more about before you can make them work for you.

For example, you know that calling on FSBOs could produce good results for you but you rarely do it. This could become a self improvement area of potential for you.

Next, refer to Step 3 for the sales tools that will help you release the potential of the three activities you've identified. Select the tools that will help you effectively implement the activities you've identified.

For example, you plan to increase your contact with FSBOs because it could produce good results. To help you fully realize the potential of these calls, you will begin using a new sales tool— a structured listing presentation.

In the space provided (right), fill out the activities that offer the greatest potential and describe what you need to do to achieve them. (What sales tools can I use? Do I need to increase the frequency with which I practice this activity, etc.?)

Be sure to set deadlines in your plan to keep you focused.
Remember, you do not really have a plan until you write it down.

Area of greatest Potential _____

What I need to do: _____

Deadline:

Area of greatest Potential _____

What I need to do: _____

Deadline:

Area of greatest Potential _____

What I need to do: _____

Deadline:

Monthly Unit Sales Goals

per Quarter

Spread your unit goals over your first three months and track your progress each month and then continue adding to the next quarter as your year progresses. Work with your manager to identify sales activities that can help you get results.

First Quarter	January	February	March
Listings Sold Unit Goal.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Actual.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Difference	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sales Unit Goal.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Actual.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Difference	<input type="text"/>	<input type="text"/>	<input type="text"/>

Second Quarter	April	May	June
Listings Sold Unit Goal.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Actual.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Difference	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sales Unit Goal.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Actual.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Difference	<input type="text"/>	<input type="text"/>	<input type="text"/>

Monthly Unit Sales Goals

per Quarter

Third Quarter

	July	August	September
Listings Sold Unit Goal.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Actual.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Difference	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sales Unit Goal.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Actual.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Difference	<input type="text"/>	<input type="text"/>	<input type="text"/>

Fourth Quarter

	October	November	December
Listings Sold Unit Goal.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Actual.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Difference	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sales Unit Goal.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Actual.....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Difference	<input type="text"/>	<input type="text"/>	<input type="text"/>

Where Am I Today?

Next Years Goal _____ (Year)

Actual Results

- A. Total Sales \$ Volume _____
divided by
- B. Total Number of Units _____
equals
- C. Average Sales Price _____

Source of Business

Listings Sold (Number of Units) _____

Sales (Number of Units) _____

% Referrals _____

% New Customers _____

Total

100%

Use this Business Planning Guide to record your goals each year.
You can find this on MyTucker.com under Education and Events.

Your Partners for Success



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