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BUSINESS PLAN

↓
AKA YOUR BEST YEAR EVER!

PREPARED BY:

YOUR NAME HERE ↪



WELCOME!

Welcome to the Best Year Ever!

We're absolutely fired up that you're joining us for this business planning session! By going through this process, you're already taking the all-important first step toward making 2026 your most successful year yet. So, hoots to you—your journey to a game-changing year begins right now!


As Todd has said for years, his business transformed when he took the time to create a detailed, written business plan. And we're confident that by fully committing to this strategic process, you're going to unlock next-level results too!

We passionately believe in this process. So give it everything you've got—and keep that momentum rolling in the weeks to come.

Think of this business plan as your 2026 Success Roadmap—it's the blueprint to achieving your goals and creating success on YOUR terms. But remember: this isn't just a one-time exercise. Your plan should be a living, breathing document that evolves with you. Set a reminder in your calendar NOW to revisit, update, and fine-tune it monthly—or even more frequently!

We believe 2026 has the potential to be an incredible year for the real estate market, and with the right plan, it can be your BEST. YEAR. EVER.

We're here for you, and we can't wait to hear about the breakthroughs and progress you make. Let us know how we can help you crush it!

Here's to your success--we're cheering you on! 
Todd, Megan & Terry

IT STARTS WITH YOU.

WHAT'S YOUR **WHY?** →

THE THING THAT DRIVES YOU OR MOTIVATES YOU.

A POWERFUL WHY COMES FROM A CLEAR UNDERSTANDING OF SELF.

WRITE DOWN WHAT TRULY MOTIVATES YOU.

WHAT'S YOUR **VISION?** →

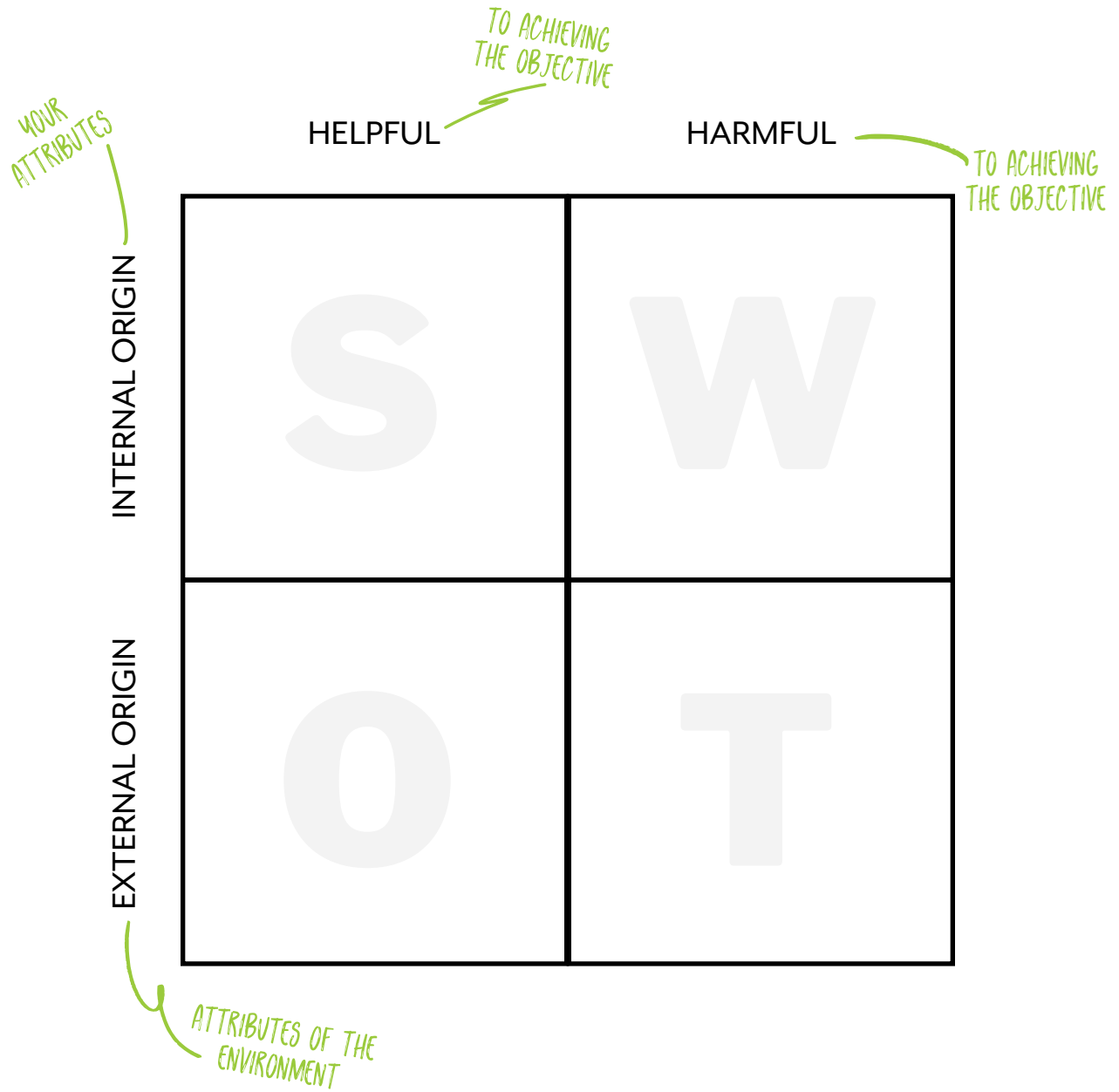
THIS IS A CLEAR, DETAILED DESCRIPTION OF YOUR BUSINESS AND LIFE IN THE FUTURE (3-5 YEARS). IT IS YOUR LONG-TERM GOALS SHOULD BE SPECIFIC, MEASURABLE, ACTIONABLE, REALISTIC AND TIME BOUND.

WHAT ARE YOUR **GOALS?** →

NOW THAT YOU KNOW WHERE YOU WANT TO BE IN 3-5 YEARS, WHAT DOES THAT MEAN FOR 2026? WHERE DO YOU NEED TO BE AT THE END OF 2026 TO BE ON TRACK FOR YOUR 3-5 YEAR VISION?

SWOT ANALYSIS

S = STRENGTHS W = WEAKNESSES O = OPPORTUNITIES T = THREATS



NIFTY NUMBERS

2025 REFLECTION ⇒⇒ HOW'D IT GO?

Transactions: _____
 Volume: \$ _____
 Average Sales Price: \$ _____
 Income: \$ _____

2026 GOALS → DREAM BIG!

Transactions: _____
 Volume: \$ _____
 Average Sales Price: \$ _____
 Income: \$ _____

SOURCES OF BUSINESS

[Lead Sources]

⇒ 2025 Actual ⇐

Buyers Sellers

⇒ 2026 Goal ⇐

Buyers Sellers

* Past & Current Clients	_____	_____	_____	_____
* Referrals from Past/Current Clients	_____	_____	_____	_____
* Sphere	_____	_____	_____	_____
* Referrals from Sphere	_____	_____	_____	_____
* Agent Referrals	_____	_____	_____	_____
* Geographical Farm	_____	_____	_____	_____
* Open Houses	_____	_____	_____	_____
* Online Leads	_____	_____	_____	_____
* Other _____	_____	_____	_____	_____
* Other _____	_____	_____	_____	_____
* Other _____	_____	_____	_____	_____

SEASONALITY (2026 closings)

First Quarter

January []
 February []
 March []

Second Quarter

April []
 May []
 June []

Third Quarter

July []
 August []
 September []

Fourth Quarter

October []
 November []
 December []

THE MAGIC OF MARKETING

STEP #1

SEGMENT YOUR DATABASE - LEVEL 1, 2, 3, & VIPS

1. Level 3's - Won't give you any business X
2. Level 2's - Might give you business ☆
3. Level 1s Will give you business 😊
4. VIP's - Will give you multiple business opportunities ♡♡

STEP #2

SPHERE MARKETING PLAN

Level 3's

Don't market to them

Level 2's

24 Email Newsletters

Level 1's

36+ Touch Plan

- 24+ E-Newsletters
- 5 Mailers
- 2 Phone Calls
- 2 Text Messages
- 1 Birthday Card
- 2 Events

SOME EXAMPLES

EVENTS

EVENTS ARE A GREAT WAY TO ENGAGE WITH YOUR SPHERE WITHOUT SOUNDING LIKE YOU'RE SOLICITING FOR SALES. IT'S ALSO A WAY TO THANK AND GIVE BACK TO THE PEOPLE WHO FUEL YOUR BUSINESS.

Things to think about: **WHAT • WHO • WHERE • WHEN • HOW** (marketing & budget)

WHAT: SPRING CLIENT APPRECIATION PARTY
WHO: LEVEL 7s AND VIPs - FAMILY FRIENDLY
WHERE DRIVE-IN EVENT AT TIBBS /WHEN: MONTH OF MAY BEFORE SCHOOLS OUT
MARKETING & BUDGET: -INVITATION EMAIL -RENTAL COSTS -EMAIL FOLLOW UP -FOOD/DRINK COSTS -1 CALL FOLLOW UP -ENTERTAINMENT -1 TEXT FOLLOW UP -1 EVENT REMINDER EMAIL

WHAT: FALL CLIENT APPRECIATION PARTY
WHO: LEVEL 7s AND VIPs - FAMILY FRIENDLY
WHERE ICE SKATING RINK /WHEN: AFTER THANKSGIVING/BEFORE CHRISTMAS
MARKETING & BUDGET: -INVITATION EMAIL -RENTAL COSTS -EMAIL FOLLOW UP -FOOD/DRINK COSTS -1 CALL FOLLOW UP -PHOTOGRAPHER -1 TEXT FOLLOW UP -SANTA -1 EVENT REMINDER EMAIL

WHAT:
WHO:
WHERE /WHEN:
MARKETING & BUDGET:

WHAT:
WHO:
WHERE /WHEN:
MARKETING & BUDGET:

SOCIAL MEDIA



EFFECTIVE SOCIAL MEDIA STARTS WITH A PLAN

Which social media sites do you plan on using in 2026?

THE BEST PLATFORM TO USE IS THE ONE YOUR SPHERE USES.

How often will you plan to post? And what type of posts?

STORIES / POSTS / VIDEOS - LONG FORM / REELS / TIKTOKS

Which tools will you use to help you?

CANVA - HOOTSUITE - LATER
META BUSINESS SUITE



GENERATE LEADS

THE LIFEBLOOD OF
OUR BUSINESS!

75% OF THIS BUSINESS IS MARKETING TO YOUR LEADS! IN ORDER TO CONSISTENTLY GROW YOUR BUSINESS, YOU HAVE TO BE GROWING THAT POOL OF LEADS, TOO.

PLAN OTHER LEAD GEN SOURCES

- Open Houses
- Farming
- Online Leads
- FSBO
- Expired Listings
- Networking Groups

	ID LEAD GEN SOURCE	
	PLAN OF ATTACK IN 2026	

GENERATE LEADS

CONTINUED!

PLAN OTHER LEAD GEN SOURCES

- Open Houses
- FSBO
- Farming
- Expired Listings
- Online Leads
- Networking Groups

	ID LEAD GEN SOURCE	
	PLAN OF ATTACK IN 2025	

PROJECT PLANNING

5 THINGS I'M GOING TO ADD TO MY BUSINESS IN 2026

PROJECT

TIMEFRAME

BUDGET

GOTTA KNOW WHERE THE \$ GOES!

⇒ Gross Commision Income (GCI) ⇐.....

⇒ Operating Expenses (OE) ⇐

Marketing Expenses

Staff

Supplies

Education

Other

☆ OE TOTAL

⇒ Cost of Sales (CS) ⇐

Cap Fee

Referral Fees

Transaction Fees

Other

☆ CS TOTAL

Net Income (NI) ⇨ GCI-OE-CS=NI

-

-

=

Net Income TOTAL

DREAM BIG

WHAT IS ONE **BHAG** THAT YOU HAVE FOR THIS YEAR?!!

→ BIG HAIRY AUDACIOUS GOAL

YOU GOT THIS!

A PLACE FOR NOTES/THOUGHTS FROM TODAY