

# THE POWER OF ONE MORE

2024 BUSINESS PLANNING WORKBOOK

Friday, October 27th - Thursday, November 16th



COLDWELL BANKER  
DISTINCTIVE  
PROPERTIES



COLDWELL BANKER  
COMMERCIAL  
PRIME  
PROPERTIES



COLDWELL BANKER  
MID-AMERICA

# WELCOME TO OUR 2023/2024 BUSINESS PLANNING EVENT

What would happen if you did one more transaction next year than you did this year? If you made one more phone call each day? Added one more contact to your database each week? Implemented one more lead generating marketing strategy?

This year's business planning event series will be focused on exactly that - setting goals to help you live the life you want, then building an ACTIONABLE and ATTAINABLE plan to take you there.

Throughout the past nearly two decades of our growing company's existence, my guiding principle has remained constant: dream big, translate those dreams into concrete plans, then get to work. That's how you forge a path to success regardless of what the market is doing. And that's what I want to share with you over the next few months – the gift of certainty in an ever-changing market.

Over the next two months, you'll set life-changing goals. You'll hear from some of the top leaders in our industry about specific actions you can take to achieve those goals. Then, you'll roll up your sleeves and build the schedule that will create real, measurable results. You'll walk away from this year's event series with a complete blueprint for transforming your business and reaching your goals.

As Sharran Srivatsaa says, "transformation doesn't happen in isolation." Whatever that looks like for you, whether it's financial freedom, more time to spend with your family, or a vacation that you've been dreaming of, we are here to support you as you build a Distinctive life.

Let's get started!



Todd  
Conflin

# AGENDA

## THE POWER OF ONE MORE

Friday, October 27th - Thursday, November 16th

### Find Your North Star II

Todd Conklin

Friday, October 27th

10-10:30am CT | 9-9:30am MT

### Map it Out

Jimmy Kleager

Friday, November 3rd

10-10:30am CT | 9-9:30am MT

### Building the Perfect Schedule

Kennan Teston

Friday, November 10th

10-10:30am CT | 9-9:30am MT

### Driving Productivity & Scaling Profitability

Bill Pipes

Thursday, November 16th

10-11:30am CT/9-10:30am MT



# PART 1: FIND YOUR NORTH STAR II



# SET THE TABLE FOR SUCCESS



# WHAT'S YOUR WHY?

What motivates you? A powerful "Why" comes out of a clear understanding of self. Do not write what should motivate you. Acknowledge the truth about what drives you.

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## GOALS

### Family

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### Faith

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### Finances

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### Fitness

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# PART 2: MAP IT OUT



  
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# SETTING YOUR 2024 PRODUCTION GOALS

$$\frac{\text{Target \# of Transactions for 2023}}{\text{Average Sale Price}} \times \frac{\text{Average Commission Rate}}{\text{Total Income}} = \$$$

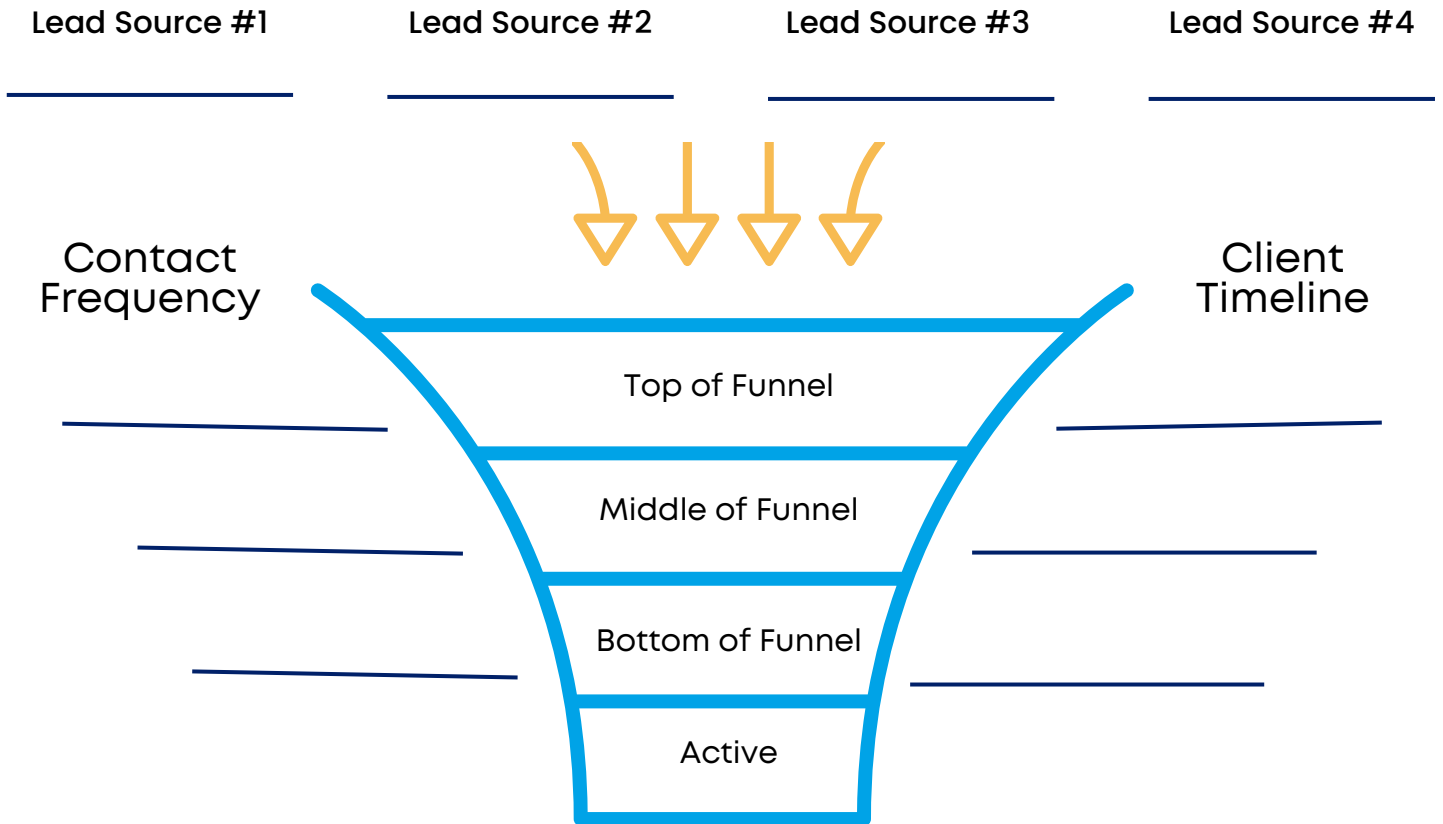
$$\frac{\$ \text{ Total Income}}{3} = \frac{\$ \text{ Take Home Pay}}{\text{Business Expenses, Taxes, Take Home}}$$

$$\frac{\text{Target \# of Transactions for 2023}}{\text{Average \# of Conversations per Transaction}} \div \frac{\text{Working Days per Year}}{\text{Conversations per Day}} =$$



# BUILD YOUR LEAD FUNNEL

## 4 LEAD SOURCES



Scan here to learn more about building your lead funnel



# MARCHING ORDERS CALCULATOR

Your marketing plan should increase brand AWARENESS and lead ACQUISITION (generation). To do so, it must define the channels of communication you will use to reach specific audiences. Your audiences consist either of people you know or people you don't know, and your channels are meant to communicate either one-to-one (1:1) or one-to-many (1:M). You also need to determine the frequency of your contacts and interactions.

	Transactions per year	Conversations per week
Lead Source #1 (SOI) - 80%		
Lead Source #2 - 10%		
Lead Source #3 - 10%		

## EVALUATING YOUR 2023 LEAD SOURCES

Lead Source	Leads	Sales	Sales Price	GCI	Cost	ROI (GCI/Cost)



# LEAD SOURCE #1

## SPHERE OF INFLUENCE

Scan here to learn more  
about communicating with  
your Sphere of Influence



# LEAD SOURCE #2

## OPEN HOUSES

Scan here to learn  
more about hosting  
open houses



# LEAD SOURCE #3

## GEO FARMING

Scan here to learn  
more about building  
your geo farm



# LEAD SOURCE #4

## SOCIAL MEDIA

Scan here to learn  
more about social  
media as a lead source



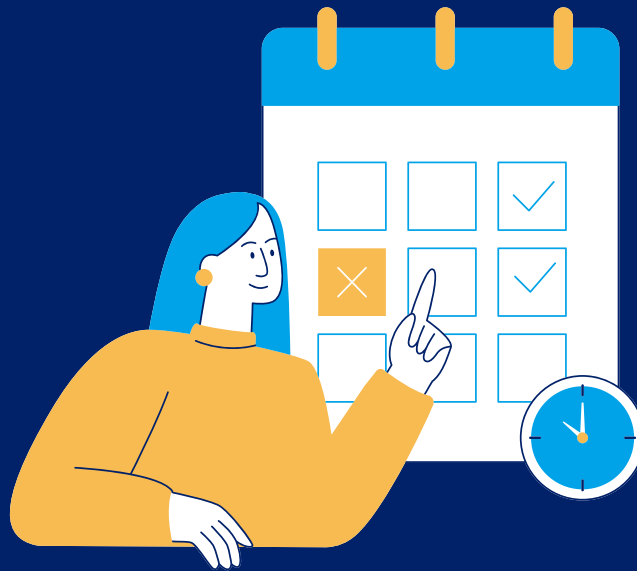
# LEAD SOURCE #3

## ONLINE MARKETING

Scan here to learn  
more about digital  
marketing



# PART 3: BUILDING THE PERFECT SCHEDULE



# BUILDING THE PERFECT SCHEDULE

Building the Perfect Schedule - Why Does it Matter?

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## 5 Things You Should Be Doing Daily

1. Prospecting

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2. Education

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3. Marketing

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4. Appointments

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5. Delivering Exceptional Service



# BUILDING THE PERFECT SCHEDULE

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
5 AM							
6 AM							
7 AM							
8 AM							
9 AM							
10 AM							
11 AM							
12 PM							
1 PM							
2 PM							
3 PM							
4 PM							
5 PM							
6 PM							
7 PM							
8 PM							

# PART 3: DRIVING PRODUCTIVITY & SCALING PROFITABILITY BILL PIPES







