

From the Coach:

53 Tips to Assure Your Plan
Works

SEMINARS, INC.

21-Point Planning Checklist to Ensure Your System Brings You the Results You Want

- Your lead generating plan has a clear relationship to the sales results you expect.
- You schedule lead generating activities - first in the morning - in your daily schedule.
- Market trends are recognized and integrated into the plan.
- Your business analysis indicates changes you want to make. Those changes are integrated into your plan.
- Your vision provides you the values to guide your decisions.
- Your vision is in sync with that of your office and company.
- Your objectives are measurable: listings sold and sales, along with other measurable objectives to expand your business.
- You are focused on revenue units, not \$.
- You want to increase your business, not just your income.
- You start with your best target market and have fully planned number of tactics for that market.
- You have enough “potentials” in your target markets to ensure results.
- You have a clear idea of how many sales/listings sold you’ll get from each market.
- Your tactics (actions) are related to a particular target market.
- You know why you’re doing each tactic.
- Your tactics are consistent and frequent to a particular market.
- Each of your tactics has a budget, work assignments and date for completion.
- You concentrate on making a profit, not just on production.
- You have set up methods to measure the results of your marketing plan.
- You have put your tactics on a calendar so you can assign yourself daily activities.
- You have a method and schedule to analyze and measure your daily, weekly and monthly progress toward your goals regularly.
- You review and make needed changes to your plan at least monthly.

23-Point Checklist: Mistakes to Avoid

- Yearly goals only—that is only a small part of a plan.
- No relationship of daily/weekly activities to monthly or yearly goals.
- No cohesive campaign to impact each target market. (Theme needs to pervade campaign.)
- Relying on re-active lead generating methods to grow business.
- One promotional piece sent once to thousands of strangers.
- No target markets defined.
- No budget attached to specific markets.
- No measurement of marketing tactics.
- Wrong target markets chosen (best – past clients)
- No dates for completion of tactics.
- Too few impacts on target markets (twelve minimum needed a year to penetrate market).
- No overall budget.
- Competition not defined or respected (plan not strong enough to take market share from competition).
- Plan not consistent with particular individual's business (all pizza parlors do not use the same plan).
- Little analysis done prior to setting objectives and deciding on actions.
- Individual doesn't thoroughly define his "position" in the marketplace prior to creating promotions.
- Activities not delegated properly.
- No systems in place to carry out plan.
- No lead generating plan.
- No placement of lead generating plan in daily activity schedule.
- Quit marketing tactics before pay-off (consistency and frequency always wins).
- No professional development planned to master the skills to be competitive.
- Using Grammy's Plan!



The Ten Best Business Planning Strategies for Today – and Tomorrow

1. *Treat your customer like an appreciating asset.*

Work your best source of business first. Make a marketing plan and budget for it, and be consistent and frequent in your communications.

2. *Think in terms of getting a ‘double’ or a ‘triple’.*

Every time you get a commission, get another commission from the same source, a referral, or a listing/sale in your area of expertise.

3. *Quit thinking ‘new business’ and focus on return business.*

It costs 6-9 times more to get a new customer. Think long-term to build your business for less money, less time, and much more reward (emotionally, too).

4. *Develop your people ‘systems’.*

Treat your business as a business—and make it saleable by creating a ‘franchise’. That is, create a system for everything you do.

5. *Know your numbers.*

In this planning system, we have talked about the importance of certain numbers. Be sure you know yours.

6. *Set your goals yearly, monthly, set your activities week and daily.*

Track and measure your daily, weekly, monthly, and yearly goals to assure you’re focused and on track.



7. *Step into management.*

Expand your horizons past just 'selling another house'. Make yourself really invaluable to your clients and customers by learning management and leadership skills and applying them to your business.

8. *Get trained.*

Learn new skills. Do not rest on your laurels. The minute you think you know it all—you are really 'over the hill'!

9. *Get coached.*

The best performers in the world have a coach. Don't settle for just 'okay'. You CAN reach the heights you desire.

10. *Three years is the charm.*

Do your plan for 3 years in a row, using this business planning system, and you will establish a track record, so planning will be a breeze!

See Carla Cross's comprehensive online business planning system, [*Beyond the Basics of Business Planning*](#) for complete planning templates, coaching, and training.

Want support in creating and implementing your plan? Contact Carla Cross at Carla@carlacross.com to discuss her coaching and training available to companies, leadership, and agents.

