LEGENDS
ARE
FOREVER.

REALTOR®
SUCCESS PLAN

To be a boss,
you have to act like a boss.
To execute a plan,
you have to have a plan.

BERKSHIRE HATHAWAY
HomeServices
Florida Properties Group

ROADMAP
FOR RUNNING YOUR BUSINESS LIKE A CEO.

This booklet is yours. Scribble on it. Write on it. Jot that thought down. This is for you to plan for the business you want. Now, go make it happen.

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CHAPTER

01

PERSONAL SAFETY PLAN

Your personal safety plan helps keep you safe in any situation. We believe safety is a TOP PRIORITY. This section will plan the actions you will take and provide resources you can take advantage of.

☐ I have verified my personnel information is up to date and accurate (address, licensed name, phone etc.)

1. Emergency Contact
   - Name:
   - Relation:
   - Phone:

2. My Associate Circle. List 3 Agents you trust in the office to notify of your agenda and whereabouts.
   - _____
   - _____
   - _____

Circle all that apply. To take precautionary measures we want you to have a plan to keep yourself safe.

1. WHEN MEETING A BUYER OR SELLER FOR THE FIRST TIME, I WILL...

a. Get a loan pre-approval as it will lead the buyer better than we can. However, be consistent in applying this standard for fair housing purposes.

b. For the seller, verify the owner's interest in the house using 3rd party (i.e. tax records)

c. Request a picture of their driver's license and send it to office or family

d. Notify a colleague/friend/family member of my agenda prior to appointments

e. Use a safety app to alert family/friends/police if there is a threat

f. Bring them into the office initially for a thorough consultation

g. Take a photo of their license plate and car once at showing

h. Other _____

2. WHEN CONDUCTING AN OPEN HOUSE, I WILL...

a. Notify a friend/family member/colleague of my agenda

b. Plan an escape route

c. Park where I cannot be blocked in

d. Have the prospects show themselves danger areas such as basement and outbuildings

e. Have each buyer register prior to viewing the home

f. Introduce myself to neighbors

g. Keep doors locked

h. Keep phone in hand

i. Other _____

3. Everyone needs a safety app! Please pick a safety app you will download and use and write it below.

_____

_____

SAFETY RESOURCES

Here at Berkshire Hathaway HomeServices Florida Properties Group, safety is a top priority. TRUST YOUR INSTINCTS. If something feels off then remove yourself from the situation. Prevention is the best thing you can do to stay safe. Your safety plan is important to know and to follow.

Below are resources to help you create your Safety Plan:

FLASHLIGHT/TASER

This item appears to be a flashlight yet is also a taser. It is a great item to keep in your hand at a showing. It appears to be a harmless tool yet can buy you the time you need to escape an unsafe situation. Available on Amazon.com. Search Vipertek Stun Gun Flashlight

NOONLIGHT (FORMERLY SAFETREK) APP

This app will call the police if you let go of your phone. To use, you keep a finger on the screen's sensor. If you remove your finger, it triggers a screen asking for a four-digit code. If you enter the code, that's your signal to the app that you are safe. If you don't, Noonlight calls the police and sends them your GPS location. *Monthly fee required.*

SHOWING BEACON

Showing Beacon is live in the ShowingTime mobile app, in select markets. Showing Beacon is designed to give you peace of mind while at a showing or meeting by offering a way to keep a preferred contact in formed of your status should you want to send an alert. *No service fee.*

ORA

ORA is a personal safety device disguised in beautiful jewelry and sportswear. When you push the button on the device, your phone will sound a loud alarm to deter would-be attackers. Instant notifications will also be sent to your unlimited network of contacts. They receive a notification letting them know where you are and that you need help. If there's no response after two minutes, your phone will call 911. Device purchase required. *No service fee.*

V. ALRT

V. ALRT is an ergonomically designed device can be carried discreetly in a pocket or a bag or worn as a bracelet or pendent. When pushed, the V. ALRT button pings your smartphone and sends personalized texts to three emergency contacts. These messages indicate that help is needed and also provide your GPS coordinates. Device purchase required. *No service fee.*

SAFE HOMES COALITION SAFEGUARDING PRESCRIPTIONS DURING PROPERTY SHOWINGS

The Safe Home Coalition helps raise awareness about the proper use, storage and disposal of prescription medication during open houses and property showings. Prescription drug abuse is a critical and complex public health issue that impacts more than 6 million Americans. *How it works:* By using a Safe Home Coalition re-sealable plastic bag, medications can easily and securely be stored and removed.

SILENT BEACON

Silent Beacon is one of the most trusted apps designed specifically for real estate agents to alert and emergency contacts. Silent Beacon is an app when connected with a panic button, functions. Silent Beacon has a list of emergency contacts where your alerts can be sent in the form of a call, e-mail or text message. You can program any contact on that list. Silent Beacon also provides your current real-time location to your concerned ones withing five seconds. The coolest part of this app is that you can reach 911 directly. You don't have to waste time with call center representatives and ask them to direct you to emergency centers. Device purchase required. *No service fee.*

GUARD LLAMA

Guard Llama allows you to get police help with just the press of a button. *How it Works:* Press the button on the device twice. The device sends a Bluetooth signal to the Guard Llama app on your phone, alerting the Emergency Dispatch Center. Guard Llama send your GPS location, photo, and medical information to the Emergency Dispatch Center. It also alerts anyone you have on your Friends & Family Contact List. Police are dispatched. Because they have your exact location withing 9 feet and know what you look like, they can find you up to three times faster than if you'd called 11 directly. *Monthly service fee. Save with an annual plan.*

HOMESNAP PRO

Agents using HomeSnap Pro can now set a Safety Timer when they go to a showing with an unfamiliar client. *How it Works:* Prior to a showing set a timer for how long you expect to be at the location and select your emergency contacts. If the timer expires, a text message will be sent to your emergency contacts that you are in distress. You can also send an instant distress alert to your emergency contacts with just one tap. *Service fee required.*

KINETIC GLOBAL

Kinetic Global Formerly LifeLine Response is a personal safety mobile app that utilizes natural human reaction to respond to emergency situations. *How it Works:* Through codes and interaction, you can set an alert for emergency contacts that you are in danger. Trigger an extremely loud alarm to deter attackers or use the silent alarm to ask for help. Once an alert is detected, the response verification center will reach out to assess the situation and contact authorities with you GPS location, if necessary. *Annual service fee.*

SENTRISMART™ MOBILE APP'S AGENT SAFETY FEATURE

NAR's REALTOR Benefits Program partner SentriLock™, a leading electronic lockbox manufacturer and service provider, has expanded their app with an Agent Safety Feature allowing REALTORS to alert contacts in the case of an unexpected or potentially dangerous situation. *How it Works:* When using SentriSmart™ app to open a lockbox, the Agent Safety Feature will launch. This feature will automatically alert your designated emergency contacts when you do not or cannot confirm you are safe. *Price:* App is free to download. You can purchase SentriLock Lockboxes through your local Association or MLS, who can then issue you a SentriCard, and where available, the SentriSmart™ Mobile App.

SEE SOMETHING SEND SOMETHING

Have you ever seen something suspicious, but weren't sure how to report it? Now you can. Download See Something Send Something and you can inform authorities if you see a potential threat. *How it works:* The See Something Send Something system developed by My Mobile Witness connects concerned citizens, first responders and law enforcement directly to key intelligence centers throughout the United States. Submitted tips are routed through a network of State Fusion centers run by State Police and State Offices of Homeland Security & Preparedness. The system routes geo tagged suspicious activity reports using a patent pending methodology for storing law enforcement data and protecting citizen's privacy. *No service fee.*

KLEARD

Kleard is a safety and productivity app that provides real-time verification for open houses and showings. *No service fee.*

PEOPLE SMART

People Smart can perform a background check on prospective clients before you meet them. *Monthly service fee.*

TRUST STAMP

The Trust Stamp App for REALTORS is a quick and simple tool to establish the identity and trustworthiness of a stranger before meeting them and/or providing access to your client's home or property. This app is available only to members of the National Association of REALTORS and is accessed using your NRDS number. *No service fee.*

WEARSAFE

Wearsafe uses location, audio, group chat, and one-touch 911 making it the smartest way to call for help. *How it Works:* At the first sign of trouble, pressing the Wearsafe Tag keeps you a step ahead of the situation. It uses the power of your phone to alert friends and family of your location, sends them audio from the scene, and starts a live chat room where they can coordinate a response or call 911. All while keeping your phone – your lifeline – out of sight. Device purchase required. *No service fee.*

02

BUSINESS STRUCTURE

As a business owner, you have options when it comes to how you structure your entity. You should talk to your CPA to find out which option is best for you! On the next few pages are some options to consider.

SOLE PROPRIETER

A **sole proprietor** is someone who owns an unincorporated business by himself or herself.

5 ADVANTAGES OF SOLE PROPRIETORSHIP
1. Less paperwork to get started.
2. Easier processes and fewer requirements for business taxes.
3. Fewer registration fees.
4. More straightforward banking.
5. Simplified business ownership.

PROS	CONS
1. No corporate business taxes	1. Unlimited liability
2. No annual reports/filings	2. No ongoing business life
3. Easy setup and low cost	3. Inability to take on business debt

LLC

A **limited liability company (LLC)** is a business structure in the U.S. that protects its owners from personal responsibility for its debts or liabilities.

5 ADVANTAGES OF AN LLC
1. Avoid double taxation.
2. Choose your LLC location.
3. Easily make changes.
4. Protect your assets.
5. Easy registration process.

PROS	CONS
1. Limited liability	1. Limited liability has limits
2. Pass through federal taxation on profits	2. Self-employment tax
3. Management flexibility	3. Consequences of member turnover

S-CORP

S corporations are corporations that elect to pass corporate income, losses, deductions, and credits through to their shareholders for federal tax purposes.

5 ADVANTAGES OF AN S-CORP

1. Tax benefits: no or lesser corporate and self-employment tax for owner, no double taxation for shareholders.
2. Protections of incorporation: limited liability, transfer of interests.
3. Prestige, credibility.
4. Straightforward transfer of ownership.
5. Cash method of accounting.

PROS	CONS
1. Tax benefits	1. Costs of incorporation
2. Pass through federal taxation on profits	2. Complex compliance rules
3. Management flexibility	3. Potentially growth-inhibiting qualifications to maintain status

C-CORP

The owners of **C-Corps** are shareholders or stockholders (ocan be an unlimited number), and are issued stock as proof of their ownership. C-Corps are viewed as separate taxpayers by the IRS and pay a corporate tax rate.

5 ADVANTAGES OF A C-CORP

1. Lower corporate tax rate and no alternative minimum tax.
2. Limited liability.
3. Multiple payment options for owners and employees.
4. Stock variety and ownership options.
5. Continued company existence.

PROS	CONS
1. Low tax rate on corporate profits	1. Full legal setup required
2. Corporate legal shield	2. Double taxation of corporate profits
3. Unlimited stockholders	3. Limited deductibility of losses

CHAPTER

03

INCOME PLANNING

There are probably a number of reasons why you became a REALTOR®. We're sure somewhere in that list is the potential for you to determine your own income. Use this section to formulate the plan that will help you achieve your income goals!

Production Information

2021 Closed: Listings _____ Buyers _____ Volume _____ Income _____

**Complete these after you complete sections 1, 2 and 3 below.*

STEP 1: SET YOUR INCOME AND CLOSED SIDES GOALS

Income Goal	(A) _____
Average Sales Price	(B) _____
Average Gross Commission Rate Per Side (%)	(C) _____
Average Gross Commission Per Side (B times C)	(D) _____
Sales Executive Commission Split (%)	(E) _____
Sales Executive Commission Split before deductions (D times E) Less Franchise Fee (D times 6%) – $ _____	(F) _____
Average Sales Executive Commission Per Side (F less deductions)	(G) _____
Number of Closed Transactions Needed (A divided by G)	(H) _____
Number of Pending Contracts Written (H divided by 80%)	(I) _____

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AVERAGE NUMBER OF SALES BY PRODUCING AGENTS

180,000

REALTORS IN FLORIDA

SINCE 2000 THE NUMBER OF REALTORS IN FLORIDA HAS ALMOST TRIPLED FROM 67,000

STEP 2: CALCULATE PROSPECTS NEEDED PER WEEK

Listings Sold Needed (70% of line I) *Percentage of Listings Sold from total closings (I)*	(J) _____
Listings That Must Be Taken (J divided by 70%)	(K) _____
Listing Presentations Needed (3 times K)	(L) _____
Number of Weeks Worked Per Year	(M) _____
Seller Conversations Per Week (J times 33 divided by M)	(N) _____
Listing Presentations Per Week (L divided by M)	(O) _____
Buyers Needed (30% of line I) *Balance of (J) % to equal 100%*	(P) _____
Buyer Prospects Needed (3 times P)	(Q) _____
Number of Weeks Worked Per Year	(R) _____
Buyer Conversations Per Week (O times 33 divided by Q)	(S) _____
Buyers Needed Per Week (Q divided by R)	(T) _____

STEP 3: SAMPLE PROFIT AND LOSS STATEMENT

Use this section to provide a pro forma profit and loss statement, also known as a projected income statement, that details sales, cost of sales, profitability, and other vital financial information.

	NET INCOME
equals net income minus total expenses	$

INCOME	
Sales Income	$
Other Income	$
NET INCOME	$

COST OF GOODS SOLD	
CoGS (Expenses)	$
TOTAL CoGS	$

NET INCOME | INCOME MINUS CoGS	$

EXPENSES	
Education/Training/Conventions	$
Professional Dues/Fees	$
Advertising/Signs/Flags	$
Office Supplies	$
Phone	$
Web hosting	$
Meals & Entertainment	$
Travel	$
Marketing Expenses	$
Taxes	$
Office Marketing	$
Mileage (# of miles times $0.56)	$
Gifts & Flowers	$
Other Expenses	$
TOTAL EXPENSES	$

CORE PARTNERS GOAL SHEET

PREFERRED LENDING SERVICES

NUMBER OF AT BATS (PER QUARTER): _____

NUMBER OF DEALS (PER QUARTER): _____

CAPSTONE TITLE, LLC

NUMBER OF AT BATS (PER QUARTER): _____

NUMBER OF DEALS (PER QUARTER): _____

2-10 HOME BUYERS WARRANTY

NUMBER OF AT BATS (PER QUARTER): _____

NUMBER OF DEALS (PER QUARTER): _____

REMINDER

Each unit closed gets you 1 additional unit for internal awards purposes.

$46,458

AVERAGE INCOME OF AGENTS WORKING AN AVERAGE OF 30-40 HOURS PER WEEK

CHAPTER

04

PROSPECTING PLAN

Prospecting is KEY if you want to be successful in real estate. This next section will help you outline the number of conversations and interactions you need to have to achieve your income goals!

PROSPECTING GOALS

_____ SELLER CONVERSATIONS
Needed weekly (from page 14)

\+ _____ BUYER CONVERSATIONS
Needed weekly (from page 14)

= _____ TOTAL WEEKLY

x4 [ ] TOTAL OUTREACH GOAL WEEKLY
Multiply this by 4 because 1 in 4 will answer

WEEKLY GOALS

Use this chart to fill in the quantity of each activity.
The combined total below should equal your outreach goal above.

QUANTITY	ACTIVITY	TALLY RESULTS
	SOI (Sphere of Influence) Phone Calls	
	Facebook Messenger Emails	
	FSBO Calls	
	Intentional Facebook Comments	
	Notecards	
	Open House Guests	
	Pop By's	
	Networking Event	
	Farming Mailer (100/mo = 25/week)	
	Farming Neighborhood Phone Calls	
	Tour newly listed homes	
	Live Real Estate Reviews	
	Buyside BMA Reports for neighborhood	
	Other:	
	Other:	

CHAPTER

05

MARKETING PLAN

Now that you know your income goal and your prospecting plan, let's focus on marketing! This section is crucial and helps put the plan in motion.

STEP 1: ANALYZE YOUR PAST PERFORMANCE

ROI OF PAST MARKETING EFFORTS					
DATE & DESCRIPTION OF MARKETING EFFORT	TOTAL COST	# OF LEADS	COST PER LEAD	TOTAL CLOSINGS	COST PER CLOSING

STEP 1: ANALYZE YOUR PAST PERFORMANCE

LEARNING FROM YOUR PAST MARKETING	
Where did the majority of your buyers come from? (the source)	
Where did the majority of your sellers come from? (the source)	
What was your most effective form of marketing?	
Why was it so effective?	
Where did you see the greatest return in your marketing?	
Will you implement your most effective marketing again?	
What didn't work or was the least effective?	
Why didn't it work?	
Will you try it agaain (after making changes to improve the plan)?	
Where do you see the greatest potential in your marketing?	

STEP 2: SET YOUR MARKETING INITIATIVES FOR THE COMING YEAR

DESCRIPTION	FREQUENCY	YEARLY COST $	MONTHLY COST $	WEEKLY TIME COST

STEP 3: SET YOUR MARKETING BUDGET (TIME & MONEY)

MY PROJECTED BUDGET	
How much time will you spend every week on your marketing?	Hours:
How much time will you spend daily?	Hours:
What percentage of future income from closings do you want to use for your marketing budget?	% Amount:
Based on your projected sales performance, how much money will you spend monthly on your marketing efforts?	$:
Do you have money outside of closings you want to contribute? If so, how much?	$:
What's your budget for attracting new business?	$:
What's your budget for sphere based marketing?	$
Other:	
Total Monthly Budget	$:
Total Yearly Budget	$:

STEP 4: CHOOSE YOUR TARGET MARKET & FARM AREAS

NEIGHORHOOD: _____	
Neighorhood or Area:	
# of Homes in the Area:	
Turnover Rate %: (For example, if there are 500 homes in a neighborhood and 25 sell during the last 12 months, the turnover rate is 5%)	
Average Price:	
Average Equity:	
Popular Online? **trends.google.com**	
Is the Farming Area Saturated with Content Online?	
Is there Potential for You to Focus on this Neighborhood Online?	
On Social Media, are there Dedicated Facebook Pages or Instagram Profiles that Focus on this area? Is there an Opportunity for You?	

STEP 5: SPHERE OF INFLUENCE TOUCH PLAN

MONTHLY TOUCH POINT	
January	Ninja Flow email sent;
February	Ninja Flow email sent;
March	2 Ninja Flow emails sent;
April	Ninja Flow email sent;
May	Ninja Flow email sent;
June	Ninja Flow email sent;
July	2 Ninja Flow emails sent;
August	Ninja Flow email sent;
September	Ninja Flow email sent;
October	Ninja Flow email sent;
November	2 Ninja Flow emails sent;
December	Ninja Flow email sent;

ADDITIONAL TOUCH POINTS	
When/ Frequency	

ADDITIONAL NOTES TO JOT DOWN

$100,000

INCOME OF AGENTS WHO ARE 2X MORE LIKELY TO UTILIZE A CRM

CHAPTER

06

HEALTH AUDIT

The Health Audit is here to help you analyze where your business soared in the previous year and where it could use some help. Being honest with yourself in this section will help you hit your goals – let's go!

DID YOU HIT YOUR GOAL THIS YEAR?

WHY?

WHY NOT?

COULD YOU HAVE DONE BETTER? HOW?

WHAT STOPPED YOU?

3 CHALLENGES YOU HAVE

Be brutally honest.

1. _____

_____

_____

2. _____

_____

_____

3. _____

_____

_____

SOLUTIONS:

_____

_____

_____

_____

_____

_____

PUT IT ON YOUR CALENDAR

IDEAS TO HELP YOU KEEP IT ORGANIZED

- Use a physical calendar or day planner to keep track of your plan.
- Buy an oversized wall calendar and update monthly.
- Make a new Google Calendar (or online calendar of choice) for your marketing plan.
- Use a project management tool like Asana or Monday.com
- Create an excel spreadsheet with due dates

I plan to use: _____

KEEP PERFECTING YOUR PLAN!

As the year goes on, you'll start discovering what works and what doesn't.

Use the information to better your markeitng! Your marketing plan doesn't have to be a static, rigid plan that never changes. You might have opportunities come up throughout the year that you want to take advantage of. Be flexible but always consistent.

DAILY
Look at your plan daily for the items you need to be executing on.

MONTHLY
Review you plan's performance that month.

QUARTERLY
Re-evaluate and make any changes as needed.

Here's to an awesome marketing plan!

SOME ADDITIONAL THOUGHTS TO DEVELOP GOOD HABITS

MINDSET

I am in sales; it takes discipline to be successful. What will I do each day to fire up my mind and stay excited and positive?

TRAINING AND PARTICIPATION

What office training/webinars and happenings will I participate in to always strive to learn new skills and new tricks for success from others?

MORNING/DAILY SCHEDULE

Am I proactive or reactive? What is my daily schedule to be sure I am reaching out to people consistently?

PROSPECTING PRACTICE

Am I smooth in my conversations to discover suspect's needs? Do I use my prequalifying questions for buyers and sellers?

LEAD FOLLOW UP SKILLS

The goal is to obtain buyer and seller appointments; how often do I call a lead back to schedule a bone fide appointment?

LISTING PRESENTATION

Do I have a presentation I use every time? Have I mastered this skill?

CUSTOMER SERVICE

How is my follow up? Do I anticipate the customer's needs and communicate clearly before they call me?

OPEN HOUSE SKILLS

Am I successful in converting buyers I meet at open houses into customers?

"We do not RISE to the level of our goal, we FALL to the level of our habits."
JAMES CLEAR, ATOMIC HABITS

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