

REAL ESTATE BUSINESS PLANNING

4-Hour Classroom Handout Workbook

COURSE OBJECTIVES

By the end of this course, you will be able to:

- Define your real estate business as a **business**, not a hobby
- Set **realistic income and transaction goals**
- Identify your **ideal client and market**
- Create a **simple marketing plan**
- Build a **weekly activity schedule**
- Understand basic **budgeting and expense tracking**
- Leave with a **written, actionable business plan**

COURSE STRUCTURE

Hour	Topic
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Hour 1	Business Vision, Goals, & Income Planning
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Hour 2	Market Focus, Client Avatar, & Lead Sources
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Hour 3	Marketing Plan & Daily/Weekly Activities
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Hour 4	Budget, Tracking, Accountability, Final Plan
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HOUR 1 — BUSINESS VISION & GOALS

1. BUSINESS IDENTITY CHECKLIST

Answer honestly. No “future version” answers.

- Why did I get into real estate?
- What do I enjoy most about real estate work?
- What do I dislike or avoid?
- How many hours per week do I realistically want to work?
- What does success look like for me in 12 months?

Written Response:

My real estate business exists to:

2. ONE-YEAR BUSINESS GOALS WORKSHEET

Personal Goals (non-financial)

- More family time
- Schedule flexibility
- Less stress
- Career growth
- Other: _____

Financial Goals

Annual GCI Goal: \$ _____

Monthly Income Goal: \$ _____

Transaction Math (Critical Exercise)

Average commission per transaction: \$ _____

Annual transactions needed:

Annual GCI ÷ Avg. Commission = _____ transactions

Monthly transactions needed: _____

3. REALITY CHECK (CLASS DISCUSSION PAGE)

- Is this goal realistic for my market and experience?
- What would have to change for me to hit this goal?
- What would stop me from hitting this goal?

HOOR 2 — MARKET & CLIENT FOCUS

4. IDEAL CLIENT PROFILE

Complete ONE primary avatar only.

Client Type (circle one):

Buyer / Seller / Investor / Renter / Relocation

Age Range: _____

Price Range: _____

Location(s): _____

Top 3 Problems They Have:

1. _____
2. _____
3. _____

Top 3 Questions They Ask:

1. _____
2. _____
3. _____

5. MARKET SPECIALIZATION CHECKLIST

- First-time buyers
- Luxury homes
- Investors
- Relocation clients
- Seniors
- VA / FHA buyers
- Geographic farm area
- New construction
- Other: _____

Why this market fits me:

6. LEAD SOURCE INVENTORY

Current Lead Sources (check all used)

- Sphere of influence
- Open houses
- Online leads
- Social media
- Referrals
- Past clients
- Cold calling
- Farming
- Networking events

Top 3 Lead Sources I Will Focus On

1. _____

2. _____

3. _____

Why these three work for me:

HOUR 3 — MARKETING & DAILY ACTIVITIES

7. SIMPLE MARKETING PLAN

Weekly Marketing Commitments

- Social media posts per week: _____
- Calls/texts per week: _____
- Open houses per month: _____
- Email/newsletter per month: _____

Messaging (What You Say Repeatedly)

Who I help: _____

How I help them: _____

Why I'm different: _____

8. WEEKLY ACTIVITY SCHEDULE

Non-Negotiable Daily Activities

- Lead follow-up
- Prospecting
- Appointments
- Marketing
- Education

Sample Weekly Time Block

Time	Mon	Tue	Wed	Thu	Fri
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Morning

Midday

Afternoon

Evening

Instructor Note:

Students should block **lead generation first**, not last.

9. KPI TRACKING SHEET (KEY METRICS)

Track weekly:

- Contacts made
- Conversations
- Appointments set
- Appointments held
- Contracts written
- Closings

What gets tracked gets improved.

HOOR 4 — BUDGET, ACCOUNTABILITY & FINAL PLAN

10. BASIC BUSINESS BUDGET WORKSHEET

Monthly Expenses

Expense	Monthly Cost
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Brokerage fees

MLS

CRM

Marketing

Signs

Gas

Education

Other

Total Monthly Expenses: \$ _____

11. PROFIT AWARENESS CHECK

- I know my monthly break-even
- I separate business and personal finances
- I plan for taxes
- I reinvest into my business

12. ACCOUNTABILITY PLAN

Who will hold me accountable?

How often will I review my plan?

- Weekly Monthly Quarterly

13. FINAL ONE-PAGE BUSINESS PLAN SUMMARY

My 12-Month Income Goal: \$_____

My Target Client: _____

My Top 3 Lead Sources:

1. _____

2. _____

3. _____

My Weekly Non-Negotiables:

Start Date: _____

Review Date: _____