2024 Business Planning Workbook To be completed before the YCM **Business Planning Excel Spreadsheet**



We Highly Recommend you print this out and fill in using a black sharpie

Start with checking your Mindset

Are you willing to look, see, and tell the truth - without thoughts, feelings or emotions) on the first few pages... and THEN let them go wild on the rest of this?

Circle Yes/No

Are you open to seeing what you need to see, even if it takes a long time to see it? Check this out: https://www.youtube.com/watch?v=Ahg6qcgoay4

Circle Yes/No

Are you willing to take the next step forward in your growth?

Circle Yes/No

Most importantly... are you FOUCSED? AWAKE? Paying attention? Present? FOCUSED? Check this out: https://youtu.be/ubNF9QNEQLA

Circle Yes/No

YES? Great. Let's get started! No? Put it aside and come back.

Step One

Reflection on BEST EVER

What year was your best ever?

of Closings that year:

Gross Income that year:

Profit that year:

\$_____

\$

If you don't know profit, leave empty... and note: as a business owner, you should know that

What was the most important factor in it being your best year ever?

(Circle one)

Was it "the Market" Or "Your Actions"?

Step Two

A GPS doesn't work if you don't know where you are!

Look at THIS year **NOW**

You know enough to guess and can always do again later if it changes

* Again - If you don't know expenses and profit, leave empty

THIS YEAR Estimated # of

Approximate Gross Income:

PROFIT

Top 3 Sources of Business this year:

What did you do.... or not do... that got in the way of even BETTER? Be specific:

What 3 things worked BEST for you this year?

Step Three

A quick look at what is next:

In general, what do you want most from Next Year – no detail, just in general?

More income? More transactions? More profit? Greater EASE (systems/staff)? Something Else?

Step Four

Time to put your Imagination to Work. If you can't imagine it, it's highly unlikely to occur.

It starts with this formula:



Imagination + Intention + Expectation + Desire + Commitment = A TRUTHFUL Decision about what you truly want - DECIDE



De-Cide Defined: "To separate and kill off all other options."

Take time to visualize what it is you want.

Time to add in thoughts feelings and emotions!



What is it that the money you want will buy?



What will you DO with more time due to hiring staff /implementing systems that smooth out the process?



Write it out in a letter dated Jan 1 a year from now reflecting on the year and what you will accomplish



Create a Vision Board or Book

What do you believe in and who you love?



Or paint it!



Or any other creative way to SEE it as clearly as you possibly can!

Passion and emotion drive a clear vision!

Next: Create Authentic Actions

Small sweet steps that lead to the Manifestation of your Imagination. Start listing those actions & by year end, put them in your calendar.

The last piece of the formula is **faith in your plan.** If you don't believe in it, it doesn't have power. Do the work to create the decision and the actions. Then have faith. Give thought to how to create that faith and keep it alive!

Step Five

What is it specifically you are willing to do differently to manifest your Vision? Some Ideas:

Improve Sources of Business, how Be more Focused in Efforts, how Work a Schedule more Carefully, how Work more/less Hours - define Hire more/less Staff – define what they do and why Increase Accountability – how Something else? Define it:



Of these choices, what do you need to work on most? Number in order of importance 1 to 5:





Of these choices, what do you need to work on most? Seven Number in order of importance 1-5:



REMEMBER:

Imagination + Intention + Expectation +
Desire + Commitment =
A TRUTHFUL Decision about what you truly
want

What did you IMAGINE?

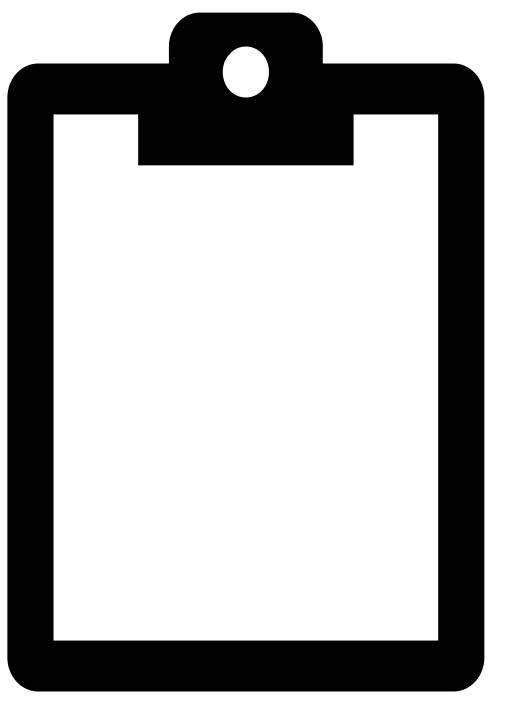
Are you willing to set a truthful INTENTION to get there?

Do you truly EXPECT to do it?

Do you have the DESIRE it will take?

To keep the COMMITMENT strong?

Based on the prior pages, write a short clear paragraph about what you want & what it will take to get there:





At Your Coaching Matters
we support Agents and Brokers to
Dream Big, Plan Well, Identify and TAKE
the steps needed to achieve their Goals
with Ease and Celebration!

So that they can expand from that Success with an enthusiastic "What's Next?!" On Dec. 31 NEXT YEAR, what do you want to look back at as your proudest accomplishment?

BONUS THOUGHTS

Are you allowing "so-so" success be good enough for you? What if that was **worse** than failing on a higher level?

What Coaching Support level do you REALLY need to be the best you can be in your business?

From THE DAILY MOTIVATOR

Path forward

There is a way through. There is a path forward.

You may have to turn around and back up for a while. You may have to admit your assumptions were wrong.

Yet as you keep going, as you persist in doing what must be done, the progress will come. Your effectiveness increases, and your momentum grows.

The achievement will be more difficult than you thought it would be. And that makes it even more valuable than you first imagined.

Every twist and turn, every effort, every setback, every small victory, will add to that value. Working your way forward, you'll discover and develop new capabilities, new strength, new confidence.

Open yourself fully to the real and present possibility of success. And push yourself positively, constantly, to make it happen.

-- Ralph Marston

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