

BUSINESS PLAN



Mission Statement



My Mission Statement:

My Core Values:

My Why:



BUSINESS GOALS



Target Annual Net Income Goal

My Tax Rate (e.g., 33% tax rate enter as 0.33)

Estimated Income Before Taxes

Adjusted Gross Commissions

My Average Commission Rate (per side)

My Previous Year Average Sales Price

Total Transactions

 Monthly Transaction Goal

 Quarterly Transaction Goal

Last 12 Months	Goal for 2021

Proactive Lead-Generation Activity Needed to Achieve Your Annual Transaction Target:

My Referral and Contact* Ratios:

My # Referrals Needed to Get 1 Close

My # Contacts Needed to Get 1 Referral

Referrals needed per month

Contacts needed per month

Daily contacts needed

Last 12 Months	Goal for 2021

Use the above information to fill out My Business Dashboard in Referral Maker CRM.
If you do not know your referral and contact ratios use the recommended ratios below:

Recommended Referral and Contact* Ratios:

- 3 Referrals to 1 Close (Transaction target x 3 = Referrals Needed)
 - 20 Contacts to 1 Referral (Referrals Needed x 20 = Total Contacts Needed)
 - $\text{Contacts needed} \div 20 = \text{Daily Contacts Needed}$ (based on 20 workdays per month)
- *Note:** "Contact" = an actual interaction with a person via face-to-face (Pop-By, etc.) or voice-to-voice (phone conversation) and ASKING FOR A REFERRAL.

2021 MARKETING PLAN

		JANUARY	FEBRUARY	MARCH
1st Quarter	Reason to Call			
	Reason to Text			
	Pop-By Gift Idea			
	Video Email Message			
	Client Party Date/Theme			
	Business Mixer Date			
	B2B Endorsement (IOV)			
	Additional Marketing			
	Events/Training			
	Time Off/Vacations			

		APRIL	MAY	JUNE
2nd Quarter	Reason to Call			
	Reason to Text			
	Pop-By Gift Idea			
	Video Email Message			
	Client Party Date/Theme			
	Business Mixer Date			
	B2B Endorsement (IOV)			
	Additional Marketing			
	Events/Training			
	Time Off/Vacations			

Be sure to plug these activities into your calendar: **1)** Attend One Buffini & Company Event **2)** Host 1 Business Mixer at least once a Quarter **3)** Host Client Appreciation Party at least 2x /Year

2021 MARKETING PLAN

		JULY	AUGUST	SEPTEMBER
3rd Quarter	Reason to Call			
	Reason to Text			
	Pop-By Gift Idea			
	Video Email Message			
	Client Party Date/Theme			
	Business Mixer Date			
	B2B Endorsement (IOV)			
	Additional Marketing			
	Events/Training			
	Time Off/Vacations			

		OCTOBER	NOVEMBER	DECEMBER
4th Quarter	Reason to Call			
	Reason to Text			
	Pop-By Gift Idea			
	Video Email Message			
	Client Party Date/Theme			
	Business Mixer Date			
	B2B Endorsement (IOV)			
	Additional Marketing			
	Events/Training			
	Time Off/Vacations			

Be sure to plug these activities into your calendar: **1)** Attend One Buffini & Company Event **2)** Host 1 Business Mixer at least once a Quarter **3)** Host Client Appreciation Party at least 2x /Year

FINANCIAL ASSESSMENT



	Business		Personal	
Total Monthly Budget				
	\$	# of Months	\$	# of Months
Total Cash Reserves				
Additional Assets				
Liabilities				
Net Worth				
Retirement				

Where will I track my expenses/budget?

How often will I commit to review?
