2027 Business Plan Workshop

Finish it in the room. Track it before you leave.

Name	
Brokerage	
Working days left this year	

Scan for everything: planner, AI prompt, bonuses
Scan and tap to download.
coachdo.com/planner

1 Where You Are Now (2026 recap, not in Excel)

You can't plan where you're going until you're honest about where you are. Real numbers only.

# of Deals Closed / Paid so far this year		**GCI Closed / Paid**	$
# of Deals Pending under contract		**# of Deals Active** rep signed	
Active buyers shown homes, last 2 weeks		**Offers out right now**	

My last 5 closings: where did each one come from? Circle the source type: **PC** past clients **R** referrals **P** prospecting **M** marketing

#	Client Name(s) or Address	Deal Type	Source type	Source of Business (exactly how)
1			PC R P M	
2			PC R P M	
3			PC R P M	
4			PC R P M	
5			PC R P M	

The source type that shows up most	☐ Past clients ☐ Referrals ☐ Prospecting ☐ Marketing

Example: 9 closed, 2 pending, 3 active buyers, 1 offer out. Last 5: R (agent referral), R (past client referral), PC, P (open house), R (friend). Top: Referrals, 3 of 5.

2 Freedom Framework (Freedom Framework tab)

Write the words that keep you dialing on a cold Monday. Stuck? Scan the QR on top for the AI prompt and let it interview you.

Three bricklayers: laying bricks, building a wall, or building a cathedral? Today real estate is my: ☐ **Job** ☐ **Career** ☐ **Calling**

MY WHY who and what this is really for	
VISION STATEMENT business and life, 3 to 5 years out	
MISSION STATEMENT who I serve, how, why it matters	
PERFECT CLIENT (Avatar) who I am built to help	
TARGET MARKET neighborhoods, price points, niche	
CORE VALUES (Top 3) how I act, even under pressure	1. 2. 3.

Examples of core values: Integrity, Family First, Client First, Excellence, Accountability, Growth, Communication, Respect, Gratitude, Work Ethic.

Example (the New Family Agent): Why: "So my kids see me build something, and I'm at their games." Mission: help first-time buyers decide with confidence. Values: Family First, Education Over Sales, Integrity in Every Interaction.

Planner tip: type your Why in the MY WHY box on the Freedom Framework tab.

3 Your Numbers (Annual Goals + Quarterly Goals tabs)

Work backward from the money to one number you control. Use a calculator. Round deals and appointments UP.



Appointments predict income.

(I) GCI goal before expenses		(E) % Total Expenses most agents 30% to 60%		Estimated Expenses ($) GCI x E		Estimated NET Take-Home before personal taxes
$	×	%	=	$	→	$

Working backward: to net $_____, GCI goal = net ÷ (1 − E) = $_____ **Team leader? Pay your own split to the team on your own deals.**

E = all costs as % of GCI (split & fees, desk, MLS & dues, E&O, marketing, tech, phone, car, meals). Most agents: 30% to 60% (it varies). Ex: $150,000 x 40% = $60,000, $90,000 net.

★ Now flip to the last page and build your reward card.

Planner field	This		That		Answer
(T) Total # Deals (I / F)	$ GCI	÷	$ (F) $ Average Commission	=	deals
Total # of Appointments	deals	÷	% conversion % (AA to DD)	=	appointments
Weekly Appointment Goal	appointments	÷	(G) Total Weeks Worked	=	ROUND UP
Dollar Value Per Appointment	$ GCI	÷	appointments	=	$ per appointment
What every conversation is worth	$ avg commission	÷	conversations per closing	=	$ per conversation
Conversations a week	deals × conversations per closing	÷	(G) Total Weeks Worked	=	conversations a week (÷ 5 = a day)
Counts as an appointment: HELD, with intent to sign a rep agreement. Showings, offers, price reductions, re-signs, and "set but not held" do not count.					

Example: $150,000 ÷ $15,000 = 10 deals ÷ 50% = 20 appointments ÷ 48 weeks = 0.42, round up to 1 a week. $7,500 per appointment. $15,000 ÷ 50 = $300 per conversation.

Deal mix (A + B + C + D must = 100%. Conversion: use 25% to 95%.)

Deal type	% of deals	# of deals	Appt / Rep Agreement %	# of appointments
(A) Listing Sales	%		(AA) %	
(B) Buyer Sales	%		(BB) %	
(C) Lease Sales	%		(CC) %	
(D) New / Pre-Construction Sales	%		(DD) %	
Total	% **100%**		%	

Quarterly split by climate (check one, or write your own; Q1 + Q2 + Q3 + Q4 must = 100%)

☐ National	☐ Warm	☐ Cold	☐ Vacation	☐ Far North	☐ My own
18 / 29 / 31 / 22	21 / 29 / 29 / 21	14 / 30 / 35 / 21	23 / 26 / 28 / 23	11 / 33 / 37 / 19	write it below

My numbers	Annual	Quarter 1	Quarter 2	Quarter 3	Quarter 4
(Q1) to (Q4) % of Sales from your climate	**100%**	%	%	%	%
Gross Commission Income (GCI) annual x quarter %					
Total # Deals annual x quarter %					
Total # of Appointments annual x NEXT quarter %					
Weekly Appointment Goal quarter appointments ÷ 13					

Example (Warm, Middle TN): $150,000 = $31,500 / $43,500 / $43,500 / $31,500. Appointments lead closings by 2 to 3 months.

4 Your Pipeline + Quick Leak Check (Deal Tracker tab)

Put a real name or address on every deal you still need. Every line you can't fill gets the SOURCE it will come from.

Deals goal		−	Closed + pending		=	+ 20% cushion		=	Lines to fill	

#	Client Name(s) or Address	Deal Type	Deal Status	Probability 1-10	Source (PC / R / P / M + how)
1					
2					
3					
4					
5					
6					
7					
8					

Only deals with a SIGNED rep agreement go on the Deal Tracker (Deal Status: Active / Due, Pending / Due, Firm / Due, Closed / Paid). The rest stay here.

Quick Leak Check: where are leads slipping through your fingers? Check your 3 biggest follow-up gaps.

- ☐ New leads not called back the same day
- ☐ Past clients not contacted in 6+ months
- ☐ People in my database don't know I'm an agent
- ☐ Friends and partners never asked for referrals
- ☐ Open house sign-ins never followed up
- ☐ Buyers who went quiet after showings
- ☐ Not answering unknown numbers
- ☐ Other: _____

My gap	Leads / month		% missed		Close rate		Avg commission		$ per year (x 12)
		×		×		×		×	$
		×		×		×		×	$
		×		×		×		×	$

Leads per month x % missed x close rate x avg commission x 12. Example: 10 x 30% x 10% x $15,000 x 12 = $54,000 a year. Circle the ONE to fix first.

5 Your Week (Monthly Actions + Day & Week Actions tabs)

Double down on your top source: _____ Going all in on it already? ☐ Yes ☐ Not even close

Lever	Action Steps	Database Touchpoint? (X)	Who or what (person or AI tool)	Hours
TIME more hours on it				
MONEY spend that feeds it				
SKILL convert it better				

Your ideal week. Lead gen first, same time every day. **L** lead gen **A** appts **F** follow-up **S** admin **P** personal

Time	Mon	Tue	Wed	Thu	Fri	Sat	Sun
6 to 9 am							
9 am to 12							
12 to 4 pm							
4 to 8 pm							

Weekly | Action Steps | Top 3-5 Priorities	1.	2.	3.

6 What You Track (Appt Tracker + Tracker Summary tabs)

This tab tells the truth. Log appointments HELD on the Appt Tracker every week: Listing Appts, Buyer Appts, Lease Appts, New / Pre-Construction Appts. Under 30 seconds.

Check 3 to 5 numbers you'll review every week (same day, about 10 minutes):

☐ **Appointments held** ☐ Conversations ☐ Rep agreements signed ☐ Appointments set

☐ Offers / pendings ☐ Closings ☐ Database touches ☐ Hours of lead gen

☐ Open houses held ☐ Other: _____

My number	Weekly target	Where I log it (planner tab or CRM)
Appointments held		Appt Tracker

Tracker Summary check-up (awareness creates control)

Pace to goal Projected Final Total	closings YTD	÷	week #	×	52	=	projected	vs goal:
Sources of Business % of my closings	**Past clients** _____%	**Referrals** _____%	**Prospecting** _____%	**Marketing** _____%				

7 Mid-Month Check + Commitment (post this at your desk)

Pick your Catch-Up Plan now, before you're behind. On the 15th there's nothing to decide, you just do it.

This month's appointment target	quarter appts	÷	3	=	ROUND UP
By the 15th I must be at	monthly target	÷	2	=	ROUND UP

Catch-Up Plan 1 if I'm behind on the 15th	
Catch-Up Plan 2	
Catch-Up Plan 3	

Example: Q1 = 20 x 29% (Q2's share, since appointments run a quarter ahead) = 5.8 appointments, so 2 a month (rounded up) and 1 by the 15th. Catch-Up Plan: call night Wednesday 4 to 6 pm, an extra open house, start an hour earlier for a week.

Calendar reminder for the 15th	☐ Set	**Weekly review day + time**	

My commitment: "Starting _____, I hold _____ appointments a week and log them every _____."

I'm telling: _____ (spouse, kids, a friend, my social post)

Signed: _____ Date: _____

Notes

Your plan, your way: write it (this workbook), type it (the Excel planner), or talk it (the AI prompt). Pick one and finish it this week. Your reward card goes on your desk.

I earn this when I hit

$ _____ GCI

by _____

My why: _____

- - fold 1 (top of the tent) - -

My 2027 Reward

Draw it. Paste it. Name it. Price it.

Name: _____ **It costs: $**_____

- - fold 2 (front bottom edge) - -

Coach DO | This panel is the base. It lies flat on your desk.

1. Draw your reward in the box. Write your GCI goal on the upside-down panel.
2. Fold on lines 1, 2, and 3, printed side OUT every time. Crease hard.
3. Stand it up: base flat, bring the top edge of the page down to fold 3, fold the narrow flap up over it. It locks.

Print this page single-sided. Put the card where you see it every day.

- - fold 3 (back bottom edge) - - tuck flap below: leave blank