

## **Client – 2026 Business Plan – Goal Builder – Real Estate**

Client Name: \_\_\_\_\_

Date: \_\_\_\_\_

**In 2026 I am: (use present tense and project to year end describing the goals you achieved)**

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**Core Values: (describe those values that you will not compromise even if it means leaving your profession if necessary)**

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**Core Purpose: (describe the idealistic motivation for doing your work-soul of what and why you do your business)**

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**Envisioned Future: (describe briefly what your business looks like in 3, 5 years)**

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**BHAG (Big, Hairy, Audacious Goal) :( describe that huge goal that will take extraordinary effort to accomplish)**

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Client – Business Plan – Goal Builder (cont'd)

**Personal Development Goals:**

**Development                      Action Plan                      Target Date                      Completed Date**

**1.**

**2.**

**3.**

**Coach’s Career Development Goal for Client:**

**Development                      Action Plan                      Target Date                      Completed Date**

**1.**

**2.**

**3.**

**2025 Actual**

	# Taken/ Written (A)	# Sold /Closed (B)	% Closed/Taken (C) (B ÷ A)	Gross \$ Volume (D)	Avg. Sales Price (E) (D ÷ B)	Commission	
						Gross Comm. (F)	Avg. Comm. (F ÷ B)
<b>Listings</b>			<b>3</b>				
<b>Buyer Sales</b>			<b>14</b>				
<b>TOTAL (OR Average)</b>			<b>17</b>	<b>4,710,000</b>	<b>\$277k</b>	<b>\$104,087</b>	<b>\$6,123</b>

**% of Business Listing Side** 18                      **Buyer Side** 82%

(Take commission from each side and divide against total overall commission.)

	# Days on Market	Avg. Sales Price	% List to Close
<b>Your Listings</b>			
<b>MLS Avg.</b>			



**Client – Business Plan – Goal Builder (cont'd)**

**2026 WEEKLY GOALS** (take monthly goals and divide by 4)

	# Taken/ Written (A)	# Sold/ Closed (B)	# Presentation/ Showing Appts. (C)	# of Appts. Set (D) (C x 2)	# Phone /Face Reaches (E)(C x 20)	# Dials/ Door Knocks (D x 20)
Listings			1-2			
Buyer Sales			1-2			
<b>TOTAL</b>	<b>1</b>		<b>3</b>	<b>10</b>	<b>50</b>	<b>120</b>

**2026 DAILY GOALS** (take weekly goals and divide by 5)

	Dials/ Door knocks	Phone/Face Reaches	# of Appts. Set	# of Presentations Showing Appts.
Listings				
Buyer Sales				
<b>TOTAL</b>	<b>24</b>	<b>10</b>	<b>2</b>	

List your source of leads from most to least and % of business in 2025. If you did not track this in 2025, go back and review each closing and assign a source to each client (see Prospecting Plan).

Source examples: sphere, past/repeat, referral, floor, ad, open house, internet, FSBO, expire.

Next commit # of dials/door knocks and approximate reaches for each source on a weekly basis.

Source	% of Business	Daily Dials/Door Knocks	Daily Reaches (Reaches)
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

**Client – Business Plan – Goal Builder (cont'd)**

**If I reach my daily goal(s) my reward will be:** \_\_\_\_\_

**If I reach my weekly goal(s) my reward will be:** \_\_\_\_\_

**If I reach my monthly goal(s) my reward will be:** \_\_\_\_\_

**If I reach my annual goal my reward will be:** \_\_\_\_\_

**Resources/skills/systems etc. needed to accomplish goal:**

\_\_\_\_\_

**My game plan to acquire those items is:** \_\_\_\_\_

\_\_\_\_\_

***I \_\_\_\_\_ commit to strive to do my very best each day to improve and grow. I will review this plan daily and will do whatever it takes to accomplish my goals. I will be positive and enthusiastic and reward myself as stated above. I will strive to grow in all areas of my life. I believe I can and will achieve my goals.***

**Client**

**Date**

**Coach**

**Date**