

# **Business Planning for the Real Estate Owner, Manager, and Team Builder**

Overview Components of a Leadership Business Plan	1
Seeing Your Vision with Clarity	2
Reviewing Your Business for Benchmarking	3
Narrowing Your Focus (Mission)	4
Deciding on Your Objectives (Goals)	5
Creating Your Action Plan and Budget in ‘People Development’	6
Creating a Cost-Effective Marketing Plan	7
Overall Plan and Budget	8
Implementing Your Plan	9
Planning Pages	10
Resources/Sample Plan	11

# Table of Contents

	Page
What is new in this 2 <sup>nd</sup> Edition About Carla Cross, CRB, MA	
<b>Section One</b> Overview: Components of a Leadership Business Plan Maintenance Schedules vs. Change Plans	9
<b>Section Two</b> Seeing your Vision with Clarity	18
<b>Section Three</b> Reviewing Your Business for Benchmarking	26
<b>Section Four</b> Narrowing your Focus (Mission)	59
<b>Section Five</b> Deciding on your Objectives (Goals) Establishing your Budget	66
<b>Section Six</b> Creating your Action Plan and Budget in “People Development” Your Recruiting Plan Your ‘Getting New Agents Started Fast’ Plan Your Retention/High Productivity Plan	72
<b>Section Seven</b> Creating a Cost-Effective Marketing Plan Action Plan: Operations Action Plan: Personal/Professional Improvement	104
<b>Section Eight</b>	123



Overall Plan and Budget

**Section Nine** 128  
Implementing Your Plan  
    Suggested Actions  
    Largest Lessons

**Section Ten** 132  
Planning Pages (also on your Document CD)

**Section Eleven** 175  
Resources  
Sample Plan



## On the Document CD



When you see this symbol, you will know that document is on your document CD. Listed below are the documents you'll need to make your business plan. In this new edition, you can complete your plan on your computer and save each document in a folder on your computer. The directions to accomplish that are below, too.

### Here's how to do that:

First, make a folder on your computer and name it something like "business plan 200\_". When you're through completing each document, you will be saving it in this folder, with each document saved using its own name as a file. Now, simply place the document CD in your computer. Open it to the document you want to complete. So you won't lose your work, save the document using "save as" (by going up to the left hand side of your word document, where you see "file" and choosing "save as" on the file menu). Save your document using the name of the document, and save it to your new folder, "business plan 200\_".

Now, put your cursor in the 'blanks' and fill them in. Keep saving to your new file as you go. When you're finished with the documents, you will have completed your business plan, and will have it in an appropriate folder.

### The documents on the document CD are:

- 'Big Picture' Plan Summary
- Vision
- Where Did You Spend Money Last Year?
- A Preliminary Analysis
- Internal: Analyzing Your Company/Your Office
- Internal: Analyzing Your Company – Finding Your Company's Strengths
- Internal: What are Your Staff Needs?
- Internal: Change-Ready Statistics – Your Office
- Mission
- Yearly Objectives
- Monthly Goals and Actuals
- The Recruiter Planner



- Action Plan Synopsis for People Development
- Your Marketing Plan Budget
- Institutional Marketing Goals and Action Plan
- Merchandise Marketing Goals and Action Plan
- Your Action Plan: Operations
- Action Plan: Personal/Professional Improvement
- Professional Development
- System/Mechanical/Labor Goals
- Overall Plan and Budget
- Business Plan Three-Month Review



## What's New in this 2<sup>nd</sup> Edition

I keep working to make this planning system a real 'tutorial' to managing a real estate office. I want to teach you how to think through every aspect of your business.

From working with owners and managers all over the world, I've learned the areas that cause the most confusion and indecision. So, I've put plenty of analysis tools inside to help you pinpoint your areas of concern—and suggest answers to your questions.

### **This is what I've added for you in this edition:**

1. 7 examples of vision and mission statements, to make it easy for you to create your 'end result' and laser focus
2. 43 planning pages, (!), with different ways to get a true look at your business, to assure you think through 'covering all the bases'
3. Now, 18 of these most important planning pages are on your document CD, ready for you to fill out on your computer, so you can do the work quickly and easily, and save it to review periodically
4. Synopsis pages, (on your document CD) giving you a place to put your biggest thoughts on your action items, so you can get to them quickly
5. 11 pages of marketing ideas and analysis, to help you in one of the most challenging areas for most brokers. You'll love these marketing pages, because they show you where to spend your money—and how to use marketing techniques very few companies take advantage of—and they're very low, or no—cost
6. 36 suggestions on how to make more money, including 8 specific strategies you can implement tomorrow to create a better team, a better management style, and more productivity
7. A section on the best leadership style you can implement, with a helpful graphic on what this looks like in a real estate office

In addition, you'll find this system now even easier to use:

I've added the "light bulb" symbol so you can easily find my 36 suggestions. Using the forms on your document CD, you'll quickly make a plan that will form your practical, ACTION plan to guide you, your managers, and your agents to success, no matter how challenging the market.



FOR LEADERSHIP

BUILDING A PROFITABLE  
BUSINESS PLAN

USING THE STRATEGIC PLANNING PROCESS

- ✚ Overview: Components of Leadership Business Plan
- ✚ Maintenance Schedules vs. Change Plans



# Components of this Leadership Business Plan

This specific system created by Carla Cross, CRB, MA



# How Using this Planning System will Result in a Plan that Works for You

Through this guide, I'll teach you how to plan using this specific system, what to include, and I'll provide additional suggestions for you to carry out your plan. This is a 'self-tutorial' on planning a real estate office!

This planning system is much more than just a "fill in the blanks". There are four important differences in this system from others:

1. The system has been **tried and proven** in real estate offices to result in a plan that works in the "real world"
2. The system is based on a thought process that the most successful companies in the world use to make plans: the **strategic planning system**
3. There are many guides for you in this system to help you through the thought process, and to give you **advice and consulting** so you can make a plan that will work for you, no matter how difficult your market is
4. This process **teaches you to think**, not just fill in blanks!

Think of me as your personal strategic planning consultant, because that's what I've provided in this "self-tutorial" planning system.

## The Difference between a Strategic Plan and just a Plan

Your market is different from others. Your situation is different from others. You won't get much of anywhere by just using a "fill in the blanks" "action plan". Why? Because you need to

### *Strategize*

That means you have to figure out where you are, where the competition is, what the market is doing, and project what you think will happen next—and how your company fits in and can capitalize on future actions.

This strategic planning process that I've outlined for you here does just that. It takes you through the critical thought processes you need to complete to come up with a plan that you know will work.



## The Problem with Most Planning Processes

Most planning processes just ask you what you're going to do, number-wise, in the future. There are two problems with that approach:

1. You don't know what got you to where you are now
2. You don't plan the specific, weekly and daily actions that assure you reach your goals



# What this Plan will Do For You

Simply, it will give you a complete roadmap for what to do each day to reach your goals. Armed with this roadmap, you can:

1. Delegate many of the actions needed to accomplish your goals
2. Hire a manager or a general manager
3. Enlist your agents in the plan so that you can better accomplish your goals

## Why Your Plan will Work

Your plan will work because you will have done the most important part of the planning process—the parts most planners leave out: The vision, mission, and review. This means you will be able to assess why you're where you are. That will give you the information you need to make the necessary changes in your plan to reach your goals. It will suggest to you the specific activities you need to take part in to reach your goals. In other words, it will

*Give you the answers you need to create more profits.*



## Bonus Suggestions to Build a Profitable Office

I want to be your professional business consultant with this planning system. So, I've added over 36 “suggestions”, worth thousands of dollars in solid advice. You will see them throughout this planning guide. Look for the light bulb in this text, and you'll know you're getting suggestions to build your office.



## Additional Resource Suggestions

Throughout this guide, I've provided additional resources for you. When you see the book, you'll know that I've listed resources for you to use to build skills, processes, and systems.



Carla Cross Seminars, Inc. • 1070 Idylwood Dr. S.W. • Issaquah, WA 98027 • (425) 392-6914  
Fax (425) 392-6414 • VM 1-800-296-2599 • email: [carla@carlacross.com](mailto:carla@carlacross.com) • [www.carlacross.com](http://www.carlacross.com)

## Where the Rubber Meets the Road: From Numbers to Action Plans

It's not enough to merely put in some numbers so you say you have a 'plan'. To succeed, you have to create a plan that gets way past the numbers to the actions you will do every week and every day to reach your goals. I have created this planning process expressly to do just that for you. You will see there are 6 specific areas in the action plan. I've found that this is the easiest way possible for leaders to decide on specific action plans to get the job done. I haven't only given you the template for these, though. I've also provided you dozens of suggestions on how to actually create systems and actions for this action plan area.

**Remember, I'm your personal business planning consultant. This is your "self-tutorial" on business planning, plus your system. You can't fail!**

