



## 2021 Business Planning Workshop Agenda

The Marathon Runner approach

Agents with years of experience figuring it out all over every year. Most agents do not confidently go from year to year with the ability to predict how the next year is going to go. Concept of wingin' it and infatuated with shiny objects.

Must be open to learn and respond. Lead and business generation is the number one area that most agents struggle with.

Not usually a knowledge issue, it's a discipline and plan problem.

Goal is to come up with a plan that breaks your results producing activities into specific day to day, week by week activities.

Everyone will walk out of here today with a specific, actionable plan.

- Establish Goal – measurable, difference between a goal, project or task.
- Determine # of transactions it takes to get there – do the math
- Determine the current sources of your business?
- Any areas of improvement that could be made?
- Looking at Marketing Plan sample is there anything new to integrate?
- Go through the I WILL List

What projects do you need to do and by what date?

How are you going to track your progress?

Discuss reason, considerations and excuses?

Establish accountability partner.

Talk about Business Development Mastermind group, Excelerate and results and next steps.