



# The Real Estate Roadmap: Your Annual Business Planning Workbook

In today's ever-evolving real estate market, staying organized, focused, and proactive is key to success. Having a well-defined business plan helps you chart a clear course, navigate challenges, and set a foundation for growth. By defining your core values, mission, and areas of focus, you create a roadmap that guides every decision you make. With this annual planning workbook, you'll assess your strengths, identify opportunities, and establish concrete goals that keep you aligned with your vision.

Don't just react to changes—plan for them, so you can approach the new year with confidence, direction, and a competitive edge.

Let's get started!



**My Core Values**

Select 10 Core value attributes from the list on the next slide and place them in the "Round 1" box.  
Select 5 attributes from "Round 1" and place in the "Round 2" box. Select 2-3 attributes from  
"Round 2" and place in your "Round 3" box. These are your final Core Values!

Round 1

Round 2

Round 2

## Core Value Attributes

When choosing your values remember they should be values that already exist versus something you are aspiring to. They come naturally to you and they are things you will not negotiate or compromise on when doing business.

|                |                     |                    |                   |                      |                  |
|----------------|---------------------|--------------------|-------------------|----------------------|------------------|
| Accountability | Contentment         | Friendship         | Job Security      | Perseverance         | Sportsmanship    |
| Achievement    | Contribution        | Fun                | Joy               | Personal Fulfillment | Stewardship      |
| Adaptability   | Cooperation         | Future Generations | Justice           | Power                | Success          |
| Adventure      | Courage             | Generosity         | Kindness          | Pride                | Teamwork         |
| Altruism       | Creativity          | Giving back        | Knowledge         | Recognition          | Thrift           |
| Ambition       | Creativity          | Grace              | Leadership        | Reliability          | Time             |
| Authenticity   | Curiosity           | Gratitude          | Learning          | Resourcefulness      | Tradition        |
| Balance        | Dignity             | Growth             | Legacy            | Respect              | Travel           |
| Beauty         | Diversity           | Harmony            | Leisure           | Responsibility       | Trust            |
| Being the Best | Efficiency          | Health             | Love              | Risk-taking          | Truth            |
| Belonging      | Environment         | Home               | Loyalty           | Safety               | Understanding    |
| Career         | Equality            | Honesty            | Make a difference | Security             | Uniqueness       |
| Caring         | Ethics              | Hope               | Nature            | Self-discipline      | Usefulness       |
| Collaboration  | Excellence          | Humility           | Openness          | Self-expression      | Vision           |
| Commitment     | Fairness            | Humor              | Optimism          | Self-respect         | Vulnerability    |
| Community      | Faith               | Inclusion          | Order             | Serenity             | Wealth           |
| Compassion     | Family              | Independence       | Parenting         | Service              | Well-being       |
| Competence     | Financial Stability | Initiative         | Patience          | Simplicity           | Wholeheartedness |
| Confidence     | Forgiveness         | Integrity          | Patriotism        | Spirituality         | Wisdom           |
| Connection     | Freedom             | Intuition          | Peace             | Sportsmanship        | Write Your Own   |

## My Mission

Your mission statement supports your vision. It serves to communicate your purpose and direction to your network and customers as well as the why behind it. Start by answering these 3 questions

**Q. What does your business do?** (In simple terms. what problem do you solve and how do you bring value)

**A.**

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**Q. How do you do it?** (What products, services or value do you provide to solve the problem)

**A.**

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**Q. Capture your 'Why'.** (Why did you start your business, What are you passionate about)

**A.**

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Now, take your 3 answers and combine them. Make your statement as concise as possible. Example: "We do X by doing Y in order to Z".

## Map Your Business Model

|                                   |                                                                                                                                                                                                                                                                              |                                                                                                                          |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| <b>Key Partnerships</b>           | Who is essential in helping you drive your business?                                                                                                                                                                                                                         | (Example: Local MLS, Office Depot, print shop)                                                                           |
| <b>Key Activities</b>             | What tasks are required for you to perform well?                                                                                                                                                                                                                             | (Example: Generating leads, open houses)                                                                                 |
| <b>Key Tools</b>                  | What tools are essential to operate your business?                                                                                                                                                                                                                           | (Example: Website, car, smartphone)                                                                                      |
| <b>Value Proposition</b>          | Why should consumers choose you as their agent? What sets you apart?                                                                                                                                                                                                         |                                                                                                                          |
| <b>Key Customer Relationships</b> | What methods do you use to maintain relationships with your customers?                                                                                                                                                                                                       | (Example: Listing alerts, referral program, newsletter)                                                                  |
| <b>Key Business Channels</b>      | Account for all the ways in which you generate new business?                                                                                                                                                                                                                 | (Example: Website, referrals, advertising)                                                                               |
| <b>Key Customer Segments</b>      | What types of consumers do you provide the most value for? What niche do you want to focus on?                                                                                                                                                                               | (Example: Retirees, families, military)                                                                                  |
| <b>Cost Structure</b>             | Identify the yearly costs associated with each expense and list them in order of most expensive to least expensive. Add them up. This is the cost of operating your business.                                                                                                | (Example: Advertising = \$5,000<br>Car = \$3,000 Print shop = \$1,200 Total = \$9,200)                                   |
| <b>Revenue Stream</b>             | The number of transactions you generate each year from all your key business channels multiplied by the average home price in your area, multiplied by your commission rate. This is your revenue stream per channel. Add them together to get your Gross Commission Income. | (Example: Referrals = 2 x (\$200,000 x 3%) = \$12,000<br>Website = 4 x (\$200,000 x 3%) = \$24,000 Total GCI = \$36,000) |

## Understand Your Strengths & Weaknesses

|  | Marketing/Branding                                                                                    | Points |
|--|-------------------------------------------------------------------------------------------------------|--------|
|  | When I do a web search for homes in my area, my website is easily found                               | 10     |
|  | I send printed mailers to my targeted areas and neighborhoods                                         | 5      |
|  | I write at least one real estate social post per day                                                  | 5      |
|  | I post YouTube videos to promote my expertise and knowledge of the local area                         | 5      |
|  | I connect with prospects and clients on Facebook or other social media channels (LinkedIn, Instagram) | 10     |
|  | I participate in local events, community associations, and organizations                              | 15     |
|  | In all my marketing, I make sure to channel responders back to my website                             | 10     |
|  | <b>TOTAL</b>                                                                                          |        |

|  | Lead Generation                                                                           | Points |
|--|-------------------------------------------------------------------------------------------|--------|
|  | I generate at least one referral each month                                               | 2      |
|  | I receive three or more referrals each month                                              | 5      |
|  | My website generates leads consistently each month                                        | 15     |
|  | My broker provides me with leads                                                          | 5      |
|  | I generate leads from online sources (i.e. Social)                                        | 10     |
|  | I receive leads from third-party providers (i.e. Homes.com, Zillow, Realtor.com)          | 10     |
|  | I use print marketing to generate new leads                                               | 3      |
|  | I use search engine advertising (Google, etc.) to drive consumers to my website           | 5      |
|  | With all my lead gen activities, I add between one and 10 leads to my pipeline each month | 10     |
|  | With all my lead gen activities, I add between 11 and 20 leads to my pipeline each month  | 15     |
|  | With all my lead gen activities, I add between 21 and 30 leads to my pipeline each month  | 15     |
|  | <b>TOTAL</b>                                                                              |        |

|  | Referrals                                                                          | Points |
|--|------------------------------------------------------------------------------------|--------|
|  | I make a concerted effort to meet new people and grow my sphere of influence       | 10     |
|  | I use automated emails to stay in touch with clients                               | 5      |
|  | I send gentle reminders to clients informing them of changes in their home's value | 5      |
|  | I connect with and engage clients on social media                                  | 5      |
|  | I send my clients polite requests for referrals                                    | 10     |
|  | I add all my clients to a newsletter delivered at least once per month             | 15     |
|  | I ask all my clients to write a review of my services                              | 10     |
|  | I focus on providing relevant content to my clients after the transaction          | 15     |
|  | <b>TOTAL</b>                                                                       |        |

|  | Lead Engagement                                                                                         | Points |
|--|---------------------------------------------------------------------------------------------------------|--------|
|  | I respond to new leads within one hour of receiving their contact information                           | 10     |
|  | I make sure all my leads are signed up for property alerts                                              | 5      |
|  | I provide relevant and helpful information to my active leads and clients regularly                     | 5      |
|  | I send at least one communication per month to my expired leads and clients                             | 5      |
|  | I make sure consumers come back my website for listings, neighborhood data, and other helpful resources | 10     |
|  | I keep all my leads and contacts in one contact management system (BoldTrail)                           | 15     |
|  | I access all my leads and marketing tools from my Smartphone as well                                    | 10     |
|  | I know when leads are utilizing my website and what they are looking at                                 | 15     |
|  | I automate communications with leads and clients                                                        | 10     |
|  | I track how many new leads enter my pipeline                                                            | 10     |
|  | I drive all lead generation channels through my website                                                 | 10     |
|  | <b>TOTAL</b>                                                                                            |        |

| Final Score                                                                                                                                                                                                                                                                                                                                                        | Points |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| <p><b>Marketing/Branding – Successful Agent Score = 30+</b></p> <p>How can you sell more homes if consumers can't find you? When they do find you, how do they know that you're the best choice for them? Marketing and branding are essential, not only for generating leads, but also for making sure leads choose you and not the agent next door.</p>          |        |
| <p><b>Lead Generation – Successful Agent Score = 50+</b></p> <p>Top agents make lead generation a primary focus in their daily business activities. They know that maintaining a consistent flow of leads entering their pipeline is the only way to generate more sales and future referrals.</p>                                                                 |        |
| <p><b>Referrals – Successful Agent Score = 25+</b></p> <p>Your odds of closing a deal with a referral are much greater than your standard lead, but referrals are notoriously hard to generate. Make it easier on yourself by always being dedicated to meeting new people, maintaining and growing your social networks, and promoting your individual brand.</p> |        |
| <p><b>Lead Engagement – Successful Agent Score = 60+</b></p> <p>There's no point in generating leads if you don't have a strategy to engage those leads once you've made initial contact. More than any other strategy, today's top agents are using technology to help them engage their leads quickly and effectively.</p>                                       |        |

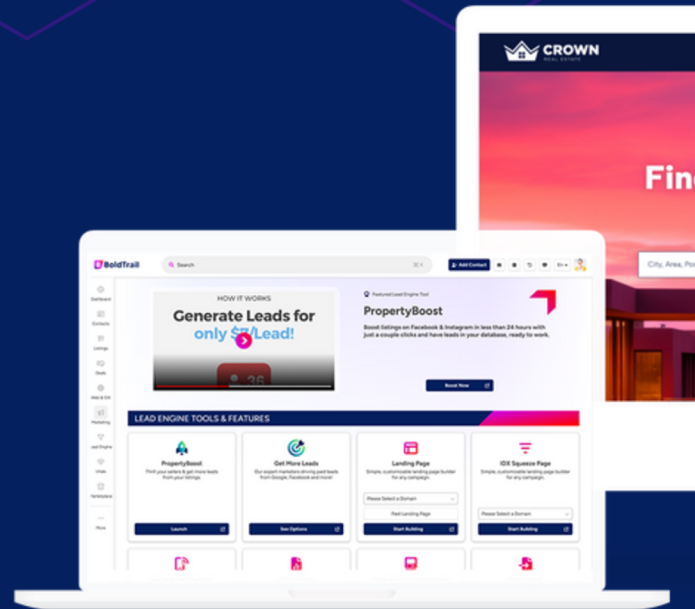
Find Your Focus Areas

| Focus Area             | Change Needed |
|------------------------|---------------|
| Lead Generation        |               |
| Lead Engagement        |               |
| Marketing and Branding |               |
| Referrals              |               |



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As you bring your business plan to life, consider the transformative role a cutting-edge tech platform can play in reaching your goals.

Partnering with a solution like BoldTrail provides the powerful tools, intelligent insights, and streamlined processes needed to take your business to the next level. With BoldTrail by your side, you'll be equipped to stay connected with clients, elevate your productivity, and grow your business like never before. Embrace the future of real estate and let BoldTrail help you turn your vision into reality.