

2025 BUSINESS PLANNING GUIDE

Section	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
Vision, Clarity and Standards	N/A	Stuck	In Process	Proficient	30,000 ft.
3 Year Vision - Clarity of Purpose					
Self Development (Personal and Professional Growth)					
Elimination of "Anchors" - Right Sized					
Mindset Maintenance - Daily Meeting with Myself					
Habits, Routines and Rituals	N/A	Stuck	In Process	Proficient	30,000 ft.
Daily Rhythm and Planning. "Am I playing on offense?"					
Weekly Review, Planning and Execution					
Quarterly Business Planning Strategy					
Life Planning (proper balance) includes travel/exploration					
Financial Strategy (Financial Team in Place)					
Health and Wellness Routines: "Protect the Asset"					
Database and Relationship Management	N/A	Stuck	In Process	Proficient	30,000 ft.
CRM Used Consistently to Manage Relationships					
Contact Segmentation and Tags (5 Lists)					
Process in Place to Execute Consistent Touches: "Next 10"					
Standard Operating Procedures	N/A	Stuck	In Process	Proficient	30,000 ft.
Repeatable Buyer Process (includes referrals and post closing)					
Repeatable Listing Processes (includes referrals and post closing)					
Listing Presentation and Client Selection Process					
Buyer Initial Consultation and Client Selection Process					
Transaction Software Used Daily					
Process In Place to Review Each Transaction for Opportunities to Improve					
Lead Generation/Marketing	N/A	Stuck	In Process	Proficient	30,000 ft.
3 Rocks of Marketing Identified					
Monthly Marketing Content Calendar in Place					
Social Media Content/Effective Personal Brand					
Website Quality and Performance					
Email Marketing Strategy complete with optimized lists					
Listing Marketing Process					