

The Ultimate Business Planner

This isn't just a workbook; it's your roadmap to building a thriving business and living the life you've envisioned. At Coach Joe, we believe in planning with purpose, acting with clarity, and achieving beyond expectations.

Let's get to it!



Hi There!

We are thrilled to have you dive into this ultimate business workbook, created to help you achieve exceptional results and build the business of your dreams. We believe in working smarter, achieving more, and making every moment count. Before you begin, we want to take a moment to thank you for trusting us to guide you on this journey. Your success is what drives us, and we're here to support you every step of the way.

We genuinely hope this workbook becomes your go-to tool for clarity, strategy, and action. Want to share your wins? Tag us on Instagram or leave us a review. We'd love to hear how you're crushing your goals! Now, let's make it happen.

So let's get started...



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MAXFIT
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SECTION 01

Reflection

Your business mirrors who you are. By exploring key relationships, events, and decisions, you can uncover your purpose and align it with your professional vision. Use this section to connect your values to your goals.

Who are the three most important people in your life? Why are they so significant?

What were the three most important events in your life, and how did they impact you?

What are the three most important decisions you've made in your life?

SECTION 02

Life Goals

Your life goals shape the foundation of your success. We believe in aligning personal growth, relationships, and career ambitions to build a balanced and fulfilling life. Use this framework to define your vision for every area of your life.

- Personal (Body, Mind, Spirit): How will you boost your health, focus, and peace?
- Relationships (Love, Family, Community): How will you deepen bonds and contribute?
- Career (Money, Work, Hobbies): What goals and passions will you chase?

PERSONAL	BODY	MIND	SPIRIT
RELATIONSHIPS	LOVE	FAMILY	COMMUNITY
CAREER	MONEY	WORK	HOBBIES

Life Goals (Examples)

Your goals are the foundation for becoming your best self. We believe in balancing health, clarity, and connection to create a purposeful life.

BODY	<ul style="list-style-type: none"> • Sign up for a sports team, running club, or fitness class by ____. • Complete your first 5K, half marathon, or fitness challenge by ____. • Improve your strength (e.g., deadlift by ____ pounds) or overall fitness by ____. • Establish a consistent bedtime to get ____ hours of sleep every night. • Commit to strength training for ____ days a week, ____ minutes per session, starting ____. • Work with a nutritionist to create a customized meal plan and start it by ____. • Complete a five-day detox or wellness program by ____.
MIND	<ul style="list-style-type: none"> • Read ____ books per month/quarter, starting ____. • Take a course or attend a workshop on ____, completing it by ____. • Learn a new skill or language with a set goal (e.g., conversational proficiency) by ____. • Plan an educational trip to ____, or visit ____ museums of art, history, or science by ____. • Identify and attend ____ conferences related to your goals or industry by ____. • Begin writing your book, blog, or creative project on ____ and complete it by ____.
SPIRIT	<ul style="list-style-type: none"> • Dedicate ____ minutes daily to reflection, prayer, or meditation. • Attend spiritual gatherings ____ times a month, starting ____. • Journal for ____ minutes daily to track gratitude and reflections, beginning ____. • Plan a wellness retreat to recharge by ____. • Attend ____ value-aligned events or conferences by ____. • Volunteer in projects that resonate with your purpose by ____.

Life Goals (Examples)

Strong relationships and community are essential for a fulfilling life. Meaningful connections with family, friends, and your network enrich personal growth.

LOVE	<ul style="list-style-type: none"> • Schedule monthly flower deliveries or thoughtful surprises for your partner by ____. • Choose ____ books to read together and start by ____. • Plan and book an anniversary trip to ____ by ____. • Attend a marriage or relationship-building event on ____. • Schedule a weekly date night and plan your first for ____. • Write an encouraging note to your partner once a week for ____ weeks, starting ____.
FAMILY	<ul style="list-style-type: none"> • Plan ____ vacation days to spend with your family and schedule by ____. • Build a model, puzzle, or fort with your kids ____ times a month, starting ____. • Book a photographer for family photos by ____. • Attend a parenting workshop or seminar by ____. • Commit to cooking ____ meals at home each week, starting ____. • Schedule sibling meet-ups or calls ____ times a month, starting ____. • Interview your kids about their dreams and choose one to pursue together by ____.
COMMUNITY	<ul style="list-style-type: none"> • Host a group event with friends or neighbors by ____. • Volunteer for a cause or local event, such as Habitat for Humanity, by ____. • Take a painting, wine-tasting, or cooking class to meet new people by ____. • Schedule ____ coffee or lunch dates with friends, starting ____. • Host a monthly dinner or game night at your home, starting ____. • Join a local club, sports team, or networking group by ____.

Life Goals (Examples)

Your financial, professional, and personal hobbies are key to a balanced life. Setting intentional goals in these areas can transform your future.

MONEY	<ul style="list-style-type: none"> • Create a budget and forecast the next 6/12/18 months by ____. • Cut dining out to ____ meals a week, starting ____. • Pay off \$____ in credit card debt by ____. • Save \$____ a month for a specific goal, starting ____. • Donate \$____ each month/year to a preferred charity by ____. • Pay off a loan of \$____ by ____. • Increase your net worth by \$____ or ____% by ____.
WORK	<ul style="list-style-type: none"> • Increase revenue by \$____ or ____% in ____ department by ____. • Launch a new product or service by ____. • Write a proposal or business plan for ____ by ____. • Transition into a new business or role by ____. • Identify and contact ____ new leads this month by ____. • Organize ____ files/accounts by ____. • Grow your audience by ____% in subscribers, followers, or fans by ____.
HOBBIES	<ul style="list-style-type: none"> • Improve your ____ score/game by ____ points/%, no later than ____. • Explore a new state or destination until you've visited them all. Start with ____ by ____. • Volunteer for ____ starting ____. • Try ____ new restaurants and create a list of favorites by ____. • Spend ____ minutes in the sun each day, starting ____. • Ask someone for their favorite book and read ____ by ____. • Plan an out-of-state hiking trip, visiting at least ____ locations by ____.

SECTION 03

Transaction Goals

Tracking your sources is the key to understanding your business growth and profitability. Review where your business stood in 2024 and set ambitious yet achievable goals for 2025.

2024 ACTUAL

2025 GOALS

LEAD SOURCE	LISTINGS	BUYERS
Past Clients		
Referrals from Past Clients		
SOI (Sphere)		
Referrals from SOI		
Agent Referrals		
Geographical Farm		
Open House		
Online Leads		
TOTAL		

PERCENTAGE OF BUSINESS		
TOTAL SALES VOLUME		
AVERAGE PRICE		
GCI		

LISTINGS	BUYERS

SECTION 04

Transaction Tracker

Staying organized is key to growing your real estate business. Use this tracker to monitor key details like dates, clients, lead sources, and commissions.

UNIT TARGET

TOTAL UNITS

SALES TARGET

TOTAL SALES

[illegible]

SECTION 05

Marketing & Lead Generation

Organize your lead sources, plan key actions, and set a clear frequency to streamline your marketing efforts and grow your reach effectively.

LEAD SOURCE	ACTION ITEM	FREQUENCY

SECTION 06

Social Media

Finalize what you would like to post and type of content to publish, consolidate all of your ideas into one list that you can reference when you plug into your content calendar.

TYPE OF CONTENT	PLATFORM	CONTENT NOTES
	FREQUENCY	
TYPE OF CONTENT	PLATFORM	CONTENT NOTES
	FREQUENCY	
TYPE OF CONTENT	PLATFORM	CONTENT NOTES
	FREQUENCY	
TYPE OF CONTENT	PLATFORM	CONTENT NOTES
	FREQUENCY	

SECTION 07

Operations

Whether you've been in your business for a few weeks, a few months, or years, getting back to the basics is always important.

SO, WHAT ARE THE MOST CRITICAL TASKS FOR MY BUSINESS?			
TECH STACK		SOPS	
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WHICH TOOLS WILL STREAMLINE MY WORKFLOW?			
HOW WILL I HANDLE CLIENT SUPPORT WHEN I'M NOT AVAILABLE?			
HOW DO I EFFECTIVELY MANAGE MY TIME?			

SECTION 08

Financial Plan

Your financial plan tracks income, expenses, and profitability each quarter. We believe clarity in your finances sets the foundation for smarter decisions and growth.

COMPANY		YEAR			
INCOME	Q1 (JAN-MAR)	Q2 (APR-JUN)	Q3 (JUL-SEP)	Q4 (OCT-DEC)	TOTAL
EXPENSES	Q1 (JAN-MAR)	Q2 (APR-JUN)	Q3 (JUL-SEP)	Q4 (OCT-DEC)	TOTAL
COMPENSATION					
LEAD GENERATION					
EDUCATION & COACHING					
OCCUPANCY					
SUPPLIES					
COMMUNICATION & TECH					
AUTO					
EQUIPMENT					
INSURANCE					
	Q1	Q2	Q3	Q4	TOTAL
INCOME BEFORE TAX					
INCOME TAX EXPENSE					
NET/PROFIT LOSS					

SECTION 09

Habits

To make meaningful progress, you often have to look backward before you can start thinking ahead. This is an effective framework for personal and professional development.

WHAT WOULD MY SPOUSE, FAMILY MEMBER OR FRIEND SEE IF THEY FOLLOWED ME FOR A DAY?
WHAT NEW HABITS SHOULD I START INCORPORATING INTO MY ROUTINE?
WHICH CURRENT HABITS SHOULD I STOP DOING AS THEY ARE HINDERING ME?
WHAT HABITS SHOULD I CONTINUE TO KEEP DOING?

SECTION 10

Monthly Execution

MONTH GOAL		MONTH	
WEEK	DESCRIPTION	STATUS	DONE
THIS MONTH'S SUMMARY		THIS MONTH'S CHECKLIST	
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Contact Us Today

HOW TO GET STARTED WITH OUR TEAM

Reach out to us today to book your initial consultation!
Together, we'll explore your goals, customize a strategy
that suits your needs, and guide you through every step
with professional expertise.

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