

# YOUR 2020 BUSINESS PLAN

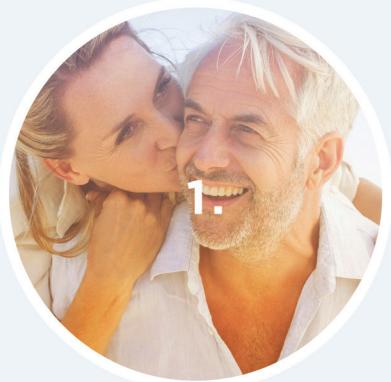
REVISIT. REEVALUATE. REFOCUS.



eleVate  
[tryelevate.com](http://tryelevate.com)

# DAILY QUARANTINE QUESTIONS

## - PERSONAL -



Who am I  
checking on or  
connecting with today?



What expectations  
of 'normal' am I  
letting go of today?



How am I  
getting outside  
of the house today?



How am I moving  
my body today?



How am I expressing  
my creativity today?



How am I practicing  
self-care today?



What am I  
grateful for today?

# REVISIT. REEVALUATE. REFOCUS.

- PROFESSIONAL -



## 1. BUDGET

Personal & Work



## 2. EXPENDITURES

Double-down on head sources with highest ROI



## 3. DATABASE/CRM



## 4. CALL/TEXT

Contacts, Clients,  
referral sources,  
and partners



## 5. EDUCATION

Online CE, designations,  
certifications, SFR



## 6. ONLINE PRESENCE

Website, blog,  
social channels ads,  
boosted posts



## 7. VIDEOS

FAQ's, virtual tours,  
market trends

**EVERY. DAY. DO. SOMETHING. FOR. YOUR. BUSINESS.**

**AND. DO. SOMETHING. FOR. YOURSELF.**



## SWOT PERSONAL GOALS

### AGENT INFORMATION

Agent Name: \_\_\_\_\_ AP: \_\_\_\_\_

Report Start Date: \_\_\_\_\_ Report End Date: \_\_\_\_\_

MY STRENGTHS: Short Term Action Items...THIS WEEK!	DUE DATE	STATUS
FUTURE OPPORTUNITIES...THIS MONTH!	DUE DATE	STATUS
WEAKNESSES: What weaknesses do I want to work on?	PROGRESS REPORT	
THREATS! Is there anything I (or we as a team) can do to overcome threats?		

# 2020 BUSINESS PLAN

## - OUTLINE -

**What do I want my real estate career to do for my overall life?**

---

---

**Why is this important to me?**

---

---

**Who else will benefit? How will they benefit?**

---

---

**Why is this important to me?**

---

---

**What will drive me every day to accomplish my goals?**

---

---

**What will my life look like in 5, 10 years if I don't grow my business?**

---

---

**SET  
S.M.A.R.T.  
GOALS**

**SPECIFIC  
MEASURABLE  
ATTAINABLE/ACHIEVABLE  
RELEVANT TO ME  
TIMED**

# SPREADSHEET DOWNLOADS

## - OTHER RESOURCES -

**FINANCIAL ANALYSIS:  
INCOME & EXPENSE  
TRACKING**  
**XLSX SPREADSHEET**

**REVIEW - LAST YEARS:  
MONTHLY PRODUCTION  
& SCORE**  
**XLSX SPREADSHEET**

## DAILY MARKETING TIPS

Register to receive daily marketing tips direct to your inbox from the marketing minds at 3sixtyfive.agency.

## TRYELEVATE.COM/BLOG

Access weekly videos (Casual Conversations, Monday Morning Mentor, etc.), great articles and other timely, helpful content for you and your business.

## @TRYELEVATERE

Follow Elevate across your favorite social channels for more great content...daily.



## AGENTS

Receive a **free 15-minute social media review** with an Elevate Success Coach. They will review your website, blog and social channels with you and provide tips, tricks & strategies for making the most of your online marketing today...and in the future.

## BROKERS

Request a **free financial analysis** with the Elevate Brokerage Development team. In this deep dive session, we'll discuss on a high-level what's working on your business, what's not working, and where there are service and/or support "gaps" that need to be filled to best support the agents and consumers you serve.

## **CONNECT WITH BRENDA THOMPSON**

Broker/Owner - HomeSmart Stars  
CEO - The Redline Group  
[brenda@theredlinegroup.net](mailto:brenda@theredlinegroup.net)  
214.797.5003

**@brendathompsonlive**



## **CONNECT WITH BONDILYN JOLLY**

VP Marketing - Elevate  
Managing Partner -  
[3sixtyfive.agency](http://3sixtyfive.agency)  
[bondilyn@3sixtyfive.agency](mailto:bondilyn@3sixtyfive.agency)  
504.813.9045

**@bondilyn**

