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REAL ESTATE

presents

SNEAKERS
Success &



TOM FERRY
#1 REAL ESTATE COACH
& CEO OF FERRY INTERNATIONAL

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DJ & LINDSEY
REAL ESTATE

Vision

DJ & LINDSEY REAL ESTATE ACKNOWLEDGES THAT BY PROVIDING CHILDREN WITH BASIC ESSENTIALS, IT IN TURN FACILITATES A FEELING OF DIGNITY, EMPOWERING PARTICIPANTS AND ENABLING THEM TO BE MORE RECEPTIVE TO LEARNING, SOCIALIZING, PLAYING AND ULTIMATELY THRIVING IN ADULTHOOD. SOME OF OUR OTHER PRIMARY GOALS ARE REFLECTIVE IN OUR MOTTO, BE KIND. WE STRIVE TO PREVENT BULLYING, RAISE SELF-ESTEEM, INCREASE PHYSICAL ACTIVITIES AND DECREASE BEHAVIORAL ISSUES THAT MAY BE PREVALENT AMONGST MOST CHILDREN IN NEED.

Mission

WITH OUR BACKGROUND AND INFLUENCE IN REAL ESTATE, WE'RE DIRECTLY CONNECTED TO SO MANY HARD WORKING ENTREPRENEURS THAT HAVE A SHARED INTEREST IN THE COMMUNITY.

JAX BEACH TO NOCATEE, FROM JULINGTON CREEK TO FRUIT COVE, FROM ST. AUGUSTINE TO HASTINGS, THOUSANDS OF OUR YOUNGEST NEIGHBORS HAVE BASIC, UNMET NEEDS. WE WANT TO CHANGE THAT AND WITH YOUR HELP WE CAN START THE CHANGE!

Tom Ferry Biography

TOM FERRY IS THE #1 RANKED REAL ESTATE EDUCATOR BY SWANEPOEL POWER 200 AND THE BEST-SELLING AUTHOR OF “LIFE! BY DESIGN” AND “MINDSET, MODEL AND MARKETING!”

AS FOUNDER AND CEO OF FERRY INTERNATIONAL, THE REAL ESTATE INDUSTRY’S LEADING COACHING AND TRAINING COMPANY, TOM’S EVER-GROWING INFLUENCE IMPACTS PROFESSIONALS IN A WIDE VARIETY OF WAYS – INCLUDING RIGOROUS ACCOUNTABILITY COACHING, THE POPULAR #TOMFERRYSHOW DELIVERING FREE, FRESH AND RELEVANT REAL ESTATE TIPS WEEKLY, HIGHLY ENGAGING TRAINING EVENTS, TWO BEST-SELLING BOOKS, AND HIS LEGENDARY KEYNOTE SPEECHES.

HE IS ALSO A HIGHLY SOUGHT-AFTER AND RENOWNED SPEAKER WHOSE CHARISMA AND PERSONALITY HAVE CAPTIVATED AUDIENCES AROUND THE WORLD. TOM’S LOVE AND PASSION FOR LIFE IS FUELED BY A COMMITMENT TO DISCIPLINE AND HOLDING PROFESSIONALS ACCOUNTABLE TO FULFILL THEIR GREATNESS.

TF TomFerry™



The New York Times
A New York Times Best Seller!



THE HUFFINGTON
POST

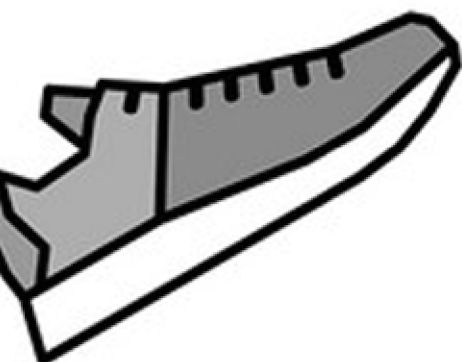
THE
WALL STREET
JOURNAL



WHERE DO THE SNEAKERS GO ???

FOOD, WATER, SHELTER, WATER, AND CLOTHING, THE FOUNDATION OF BASIC HUMAN NEEDS ARE THINGS MANY OF US TAKE FOR GRANTED IN OUR DAY TO DAY LIFE. THE SHOES YOU PROVIDE WITH FIND THEIR WAY TO AN INDIVIDUAL WHO DOES NOT TAKE BASIC NEEDS FOR GRANTED. SO, THANK YOU WE ARE SO GLAD YOU COULD HELP MAKE THIS EVENT MORE THAN JUST INFORMATIONAL.

WITH THAT BEING SAID, AS IMPORTANT IT IS TO COLLECT THE NEEDED ITEMS, IT IS EQUALLY IMPORTANT TO SOURCE HONEST, CARING, REPUTABLE ORGANISATIONS TO DISPERSE THE GOODS COLLECTED. WE SEARCHED LONG AND HARD TO PUT TOGETHER A LIST OF THE TOP LOCAL CHARITIES. HERE IS WHERE YOUR CONTRIBUTIONS ARE GOING.



Community Partnership Schools

The Challenge

Thousands of Florida students arrive to school each day with more than a backpack - they carry baggage beyond their years: hunger, homelessness, poverty, exposure to violence, mental health struggles, inadequate access to health care and more. They carry so much weight that they simply cannot focus on their education.

The Solution: Community Partnership Schools

Through a long-term partnership with the school district, a college or university, and a health care provider, CHS leads community collaboration to bring resources and opportunities to students and families. By addressing barriers to learning —poverty, food insecurity, homelessness and others – Community Partnership Schools bring together high-quality academic supports, health care, counseling, mentoring and more – right at the school.

What Makes a Community Partnership School Unique?

Community Partnership Schools are proven to improve student behavior, increase academic gains and graduation rates, and enhance parental involvement. The model helps to provide learning environments that offer equitable opportunities and success for all students.

In addition to being a founding partner of the Community Partnership Schools T M model – along with the University of Central Florida and Orange County Public Schools – CHS is a core partner in 21 Community Partnership Schools from Pensacola to Miami.

The core of every Community Partnership School is a strong foundation:

4 or more core partners:

School district, reputable non-profit like CHS, health care provider, college or university.

Long-term commitment:

Partners make a 25-year (or longer) commitment.

Shared decision making:

Governed by a council of representatives from each partner organization, school leadership and community members to make decisions about funding, resource allocation, services and more.

Leveraged resources:

Community Partnership Schools identify and coordinate local providers that can offer academic support programs, enrichment activities and wellness services at the school. By blending and braiding funding from multiple sectors (health, education, human services) we create opportunities in the school and surrounding community to remove barriers to learning and success.



Each Community Partnership School focuses on four pillars:

Expanded Learning: Academic support and enrichment take place before and after school, during weekends and in the summer to augment traditional learning during the school day.

★ **Wellness Supports:** A range of health and social services are accessible on the school campus.

★ **Family & Community Engagement:** Families and the community are partners in children's education, and the school becomes a neighborhood center offering enrichment opportunities for both students and adults.

★ **Collaborative Leadership:** A culture of shared governance and collective decision-making advances a unified vision to identify needs and provide appropriate resources and solutions in the school and community.

Why does this matter?

Every child deserves the opportunity to learn and succeed ... but the reality is that, far too often, a child's zip code and family circumstances determine their future -- and their potential is lost, creating a ripple effect throughout the community.

Community Partnership Schools aim to change that: 87% of students attending Florida's 29 schools – 21 of which CHS provides leadership as a core partner – are economically disadvantaged. This model empowers students to realize their potential and find paths toward academic and life success.



IN MAY 2020, THERE WAS AN INCREASE OF 2.5 MILLION CHILDREN LIVING IN POVERTY AS A RESULT OF COVID-19



CHILDREN WHO GROW UP IN POVERTY ARE FIVE TIMES MORE LIKELY TO DROPOUT OF HIGH SCHOOL. TODAY, NEARLY 80 PERCENT OF THE PRISON POPULATION ARE HIGH SCHOOL DROPOUTS.



21 PERCENT OF LOW-INCOME CHILDREN AND YOUTH AGED 6 TO 17 HAVE MENTAL HEALTH CHALLENGES. CHILDREN AT RISK FOR MENTAL HEALTH CHALLENGES IN FIRST GRADE FACE A 5% DROP IN ACADEMIC PERFORMANCE IN JUST TWO YEARS.



STUDENTS WITH TOOTHACHES ARE ALMOST 4 TIMES MORE LIKELY TO HAVE A LOW GRADE POINT AVERAGE.

Through the Community Partnership Schools™ model, students have greater opportunities to thrive. Below is a small snapshot of this impact:

AT C.A. WEIS ELEMENTARY:

The percentage of students making learning gains in ELA Reading is 8% higher than the school district and 7% higher in ELA Math.



Disciplinary referrals dropped by over 90% between 2016-2020.



Out of school suspensions have decreased by 94% since 2016.

AT THE WEBSTER SCHOOL:

Students demonstrated a 46% increase in learning gains in FSA Math in 2018 to 2021.

21% → 67%

AT ENDEAVOUR ELEMENTARY:

The percentage of students making learning gains in the FSA ELA* more than tripled between 2016 and 2019.

67% → 95%
*FSA ELA = Reading

AT EDWARD H. WHITE HIGH SCHOOL:

67% → 96%

Graduation rates increased 29% between 2015 and 2021.

AT EVANS HIGH SCHOOL:

Evans High School has seen a 185% increase in college acceptances to UCF since 2012.

↑ 185%

AT OCPS ACADEMIC CENTER FOR EXCELLENCE:

Overall learning gains on the FSA MATH increased from 32% in 2018 to 48% in 2019.

Overall learning gains on the FSA ELA* increased from 38% in 2018 to 58% in 2019.

*FSA ELA = Reading

AT MORT ELEMENTARY:

The average teacher retention rate at Mort Elementary was 13% higher than 5 comparative schools between 2013-2018.

↑ 13%

Where are we today?

Children's Home Society of Florida serves more than 19,000 students in 21 Community Partnership Schools from Pensacola to Miami

- Evans High School - Orlando★
- Endeavour Elementary - Cocoa★
- C.A. Weis Elementary - Pensacola★
- Mort Elementary - Tampa★
- Edward H. White High School - Jacksonville
- Howard Bishop Middle School - Gainesville
- South Woods Elementary - Elkton★
- Webster Elementary - St. Augustine★
- OCPS Academic Center for Excellence (ACE) K-8 - ★
- Orlando Wilkinson Junior High School - Middleburg★
- Sabal Palm Elementary - Tallahassee★
- Keystone Heights Jr/Sr High - Keystone Heights★
- Orange Park High School - Orange Park
- Dodgertown Elementary - Vero Beach
- Miami Southridge Sr. High - Miami
- Manatee Elementary - Bradenton
- Eccleston Elementary - Orlando
- Jones High School - Orlando
- Homestead Middle School - Miami
- Arthur & Polly Mays Conservatory of the Arts - Miami
- Parker Elementary - Panama City



Through Community Partnership Schools, children find hope and opportunities. Simply put: they learn how to dream again.

“ ***Every child should have the same resources, opportunities and privileges to be what they want to be. Your background, race, economic status and the neighborhood you grew up in does not make you any greater or less – every child can succeed despite the barriers in their way.*** ”

Rebecca Boreland

2017 graduate of Evans High, A Community Partnership School
Currently attending University of Florida, College of Nursing



For additional information on Community Partnership Schools or to learn how to get involved, contact Jarvis Wheeler, Senior Director, Community Partnership Schools: Jarvis.Wheeler@chsfl.org | 407-463-1706 chsfl.org/communitypartnershipschools

HUGS ACROSS THE COUNTY



Hugs Across the County is a 501(c)(3) nonprofit based in St. Johns County, Florida. Our mission is:

- Raise awareness throughout the County about student poverty right here in our own community.
- Work closely with school counselors and the student services staff to identify needs.
- Raise funds and provide assistance to students in crisis situations.
- Organize St. Johns County neighbors to work together to provide assistance to our youngest residents.
- Provide classroom volunteers and mentors to Title 1 schools that serve more than 80 percent of students on free and reduced meal programs.

St. Johns County is full of wonderful, giant-hearted businesses, civic organizations, and schools! We are grateful for our community partners who work closely with us to identify student needs, collect donations, hold fundraising events and more. Please contact us at info@stjohnshugs.org to brainstorm creative ways that we can work together to benefit St. Johns County kids!



Making an Impact!

SAYS Community Program Performance for FY 21 -22



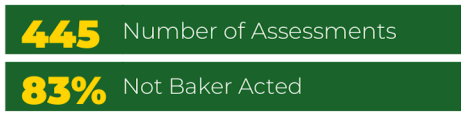
During the past decade, SAYS has taken a leadership role in providing mental and behavioral health and outpatient community services to boys, girls, LGBTQ-identified, and their families when necessary.

As illustrated below, the results for the clients have been amazing. Equally significant is the potential community savings realized by diverting youth from costly alternatives.

Mobile Response Team (MRT)

In St. Johns County, MRT provides 24/7 intervention and safety assessments to children and youth (ages 0-25) experiencing a mental or behavioral crisis event to help reduce involuntary & costly hospitalizations.

FY 21-22 Impact

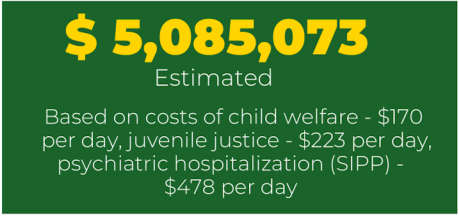


Potential Community Savings



Community Action Team (CAT)

In St. Johns County, CAT provides intensive community-based services to children and youth (ages 11-21) with history of mental illness and multiple treatment failures, who are at risk of out-of-home placement or to return to out of home placement.



Note: 100% CAT clients have potential for psychiatric hospitalization.

Coaches Program

In St. Johns, Flagler, Putnam counties, the Coaches Program increases access to evidence-informed mental health services, community resources, and social supports for at-risk children and youth (ages 6-21) diagnosed with serious mental health illness.



Note: Results measured during time of Service.

PORT

in the Storm

“I tried to remember who I wanted to be; Where I came from before my name shriveled under the labels of “at-risk, runaway, throwaway, trash”. – a homeless youth

Homelessness Robs Kids of their Hope and Their Future. Port in the Storm is a “port in the storm of life” for youth who have fallen through the cracks. They say that the opposite of love is not hate, but indifference. No one cared if they came home and what was going on at home was often scarier than the streets. Now they are on the streets and more alone than ever.

St. Augustine Society, Inc. operates St. Francis House and Port in the Storm Homeless Youth Center. These are the only comprehensive shelter and housing crisis centers serving St. Johns County. Residential shelter and day-drop-in services are available at both the youth campus and the adult/family shelter campus. Services provided include basic needs, case management, referrals and more. For more information visit www.stfrancisshelter.org

Located at 1375 Arapaho Avenue, day drop-in services are provided from 8 a.m. to 6 p.m. daily including life skills, basic needs, job skills, housing assistance and more. Port in the Storm now provides 16 beds for those youth needing a place to stay. Your gift can be the difference between a desperate situation and hope. Your gift can help break the cycle of homelessness of our youth in St. Johns County. You can transform a child's life.



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LENDERS



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ATTORNEYS



BUYERS/SELLERS



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Who We Are
Jess Arnow
Operations Manager

“We are dedicated to ensuring your transaction is handled with accuracy, honesty and efficiency from initial contact to closing.”

[FIND A FLORIDA CLOSING COMPANY PROFESSIONAL](#)

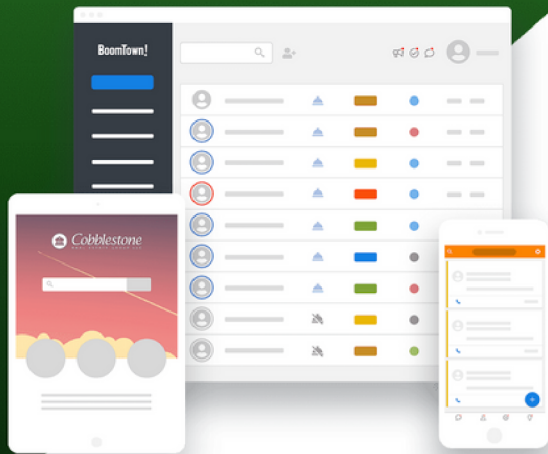
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—DJ & Lindsey DellaSala

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Refinancing Guide

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What people are saying about us

"I was on a very short timeline and a sort of complicated situation. The team at CrossCountry really rallied to get it all done in time. Can't really express how much I appreciate the effort."

Philip Kirshman

904-604-5626

TheHeritageTeam@myccmortgage.com

A VERY SPECIAL THANKS TO

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2023 Business Plan

Part A : Foundations

Commitment

Interested? Committed? Obsessed? You're about to lay out your plan for 2022, your bridge to your future. But a plan without the will to execute is only words on a page. So, write a message to yourself and your coach stating how seriously you are committed to implementing this plan and being held accountable to it.

Accountability

What additional accountability do you need to ensure your success? Let your coach know.



TF TomFerry™

2023 Business Plan

Tom Ferry's Business Planning Best Practices

I'm giving you access to this comprehensive business plan to help you identify the **daily, weekly,** and **monthly actions** needed to achieve your 2023 goals.

PLEASE NOTE: This is NOT intended to be completed on your own. Our "best practices" recommendation would be to sit down with your coach, or if you don't have a coach, schedule a free call with one of our expert business consultants to help walk you through the plan. That way, you have proven guidance to help you make the best decisions for your future.

Another option is to take advantage of a series of webinars we've created that are available to our [Sphere training subscribers](#) that will walk you through various aspects of the business planning process.

No matter what, be sure to block out time and give your plan the attention it deserves. The more effort you invest up front, the clearer your path to 2023 success will become.

Here's to a more productive version of yourself in the new year!

A handwritten signature in black ink that reads "Tom" followed by a stylized, cursive flourish.

Tom Ferry

CEO & Founder, Ferry International



Without a written plan
in place, **you're simply
rolling the dice with
your future.**

Tom Ferry

2023 Business Plan

Part A : Foundations

Activity & Ratios



IMPORTANT NOTE: To best calculate these numbers, complete this page using the business plan in illūm.



Percentage of listing appointments that result in listings taken

Percentage of listings taken that close

Percentage of initial buyer appointments that close

Conversations per close

Conversations

Hours of Power (HOP)

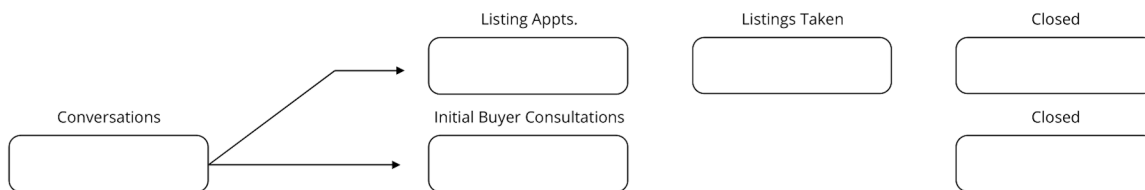
:

Avg. Conversations per Hour of Power

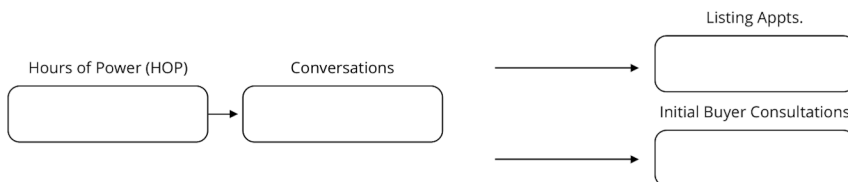
Prospecting Days Per Week

Prospecting Weeks Per Year

What You Need to Do This Year



What You Need to Do This Week



What You Need to Do Today!



2023 Business Plan

Part A : Foundations

Commitment

Interested? Committed? Obsessed? You're about to lay out your plan for 2023, your bridge to your future. But a plan without the will to execute is only words on a page. So, write a message to yourself and your coach stating how seriously you are committed to implementing this plan and being held accountable to it.

Accountability

What additional accountability do you need to ensure your success? Let your coach know.

Why

What motivates you? A powerful Why comes out of a clear understanding of self. Do not write what should motivate you. Acknowledge the truth about what drives you.

2023 Business Plan

Part A : Foundations

Vision

A vision statement is a clear, detailed description of your business in the future, say, 3-5 years from now. It clarifies your long-term goal. It should be Specific, Measurable, Actionable, Realistic and Time-bound. Unlike your mission, it is usually not meant to be publicized.

Mission

A mission statement articulates the purpose of your business and your means of reaching it. It should be a simple sentence or a phrase. The public needs to see it. And you need to focus on it.

Values

Values shape identity and guide decision making. Instead of single words, write brief sentences. Consider - and feel free to use - Tom's: 1) Deliver Value; 2) Embrace Innovation; 3) Build and Maintain Trust; 4) Execute with Relentless Discipline; 5) Strive for Greatness. Share your values with the public. Embrace them yourself.

2023 Business Plan

Part B : Business Goal Setting

Predicted Seasonality

A well-thought-out business plan should be a continual reference point for your business. However, if your numbers aren't realistic, it's easy to dismiss your plan as irrelevant. Realistic means taking into account how sales patterns fluctuate during the year. If winter is a slow time, you need to account for that so you don't fall short of a revenue objective you couldn't meet.

Projected Units Sold per Month and per Quarter

2023	<input type="text"/>	January	}	}	<input type="text"/>	Quarter 1
	<input type="text"/>	February				
	<input type="text"/>	March				
	<input type="text"/>	April	}	}	<input type="text"/>	Quarter 2
	<input type="text"/>	May				
	<input type="text"/>	June				
	<input type="text"/>	July	}	}	<input type="text"/>	Quarter 3
	<input type="text"/>	August				
	<input type="text"/>	September				
	<input type="text"/>	October	}	}	<input type="text"/>	Quarter 4
	<input type="text"/>	November				
	<input type="text"/>	December				

2023 Business Plan

Part C : Marketing and Lead Generation Planning

Agent Marketing Plan

Your marketing plan should increase brand AWARENESS and lead ACQUISITION (generation). To do so, it must define the channels of communication you will use to reach specific audiences. Your audiences consist either of people you know or people you don't know, and your channels are meant to communicate either one-to-one (1:1) or one-to-many (1:M). And you need to determine the frequency of your contacts and interactions.

Unique Selling Proposition (USP)

What differentiates you from everyone else? Consider the problem you address, the solution you offer and what benefit that solution provides. That is the formula for creating a USP. You may have more than one USP to address each of the types of prospect you solicit or even each side of a transaction.

Lead Source/Audience		Geographic Farm (GF) - Rolling Mill Estates (500 Residences)	
Marketing Plan Advertising to create awareness and consideration	Networking Plan Socializing to foster referral-producing relationships	Transactions Goal <hr/> 5	
<ul style="list-style-type: none"> • 24 open houses (OH) (semi-monthly) • 12 bulk mailers (monthly) • Targeted FB videos (monthly) 	<ul style="list-style-type: none"> • Annual community event booth • PTA board meetings • Community bus. assoc. meetings 	Prospecting Plan Contacting a group of people in search of leads	
Follow-Up Plan Repeated communication with non-responsive leads aimed to elicit conversation	Nurturing Plan Repeated communication with responsive leads aimed to set appointments	<ul style="list-style-type: none"> • OH neighbor invites (semi-monthly) • Circle prospecting (3 days/week) • Purchase Realtor.com leads in GF 	
<ul style="list-style-type: none"> • 24 open houses (OH) (semi-monthly) • Ref./use FB seller follow-up plan • Ref./use FB buyer follow-up plan 	<ul style="list-style-type: none"> • Annual community event booth • Ref./use FB seller nurture plan • Ref./use FB buyer nurture plan 		

2023 Business Plan

Part C : Marketing and Lead Generation Planning

Lead Source/Audience

#1 Marketing Plan

Advertising to create awareness and consideration

- _____
- _____
- _____
- _____
- _____
- _____

Follow-Up Plan

Repeated communication with non-responsive leads aimed to elicit conversation

- _____
- _____
- _____
- _____
- _____
- _____

Networking Plan

Socializing to foster referral-producing relationships

- _____
- _____
- _____
- _____
- _____
- _____

Nurturing Plan

Repeated communication with responsive leads aimed to set appointments

- _____
- _____
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- _____

Transactions Goal

Prospecting Plan

Contacting a group of people in search of leads

- _____
- _____
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- _____

2023 Business Plan

Part C : Marketing and Lead Generation Planning

Lead Source/Audience

#2 Marketing Plan

Advertising to create awareness and consideration

- _____
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- _____
- _____

Follow-Up Plan

Repeated communication with non-responsive leads aimed to elicit conversation

- _____
- _____
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Networking Plan

Socializing to foster referral-producing relationships

- _____
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- _____
- _____

Nurturing Plan

Repeated communication with responsive leads aimed to set appointments

- _____
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- _____

Transactions Goal

Prospecting Plan

Contacting a group of people in search of leads

- _____
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- _____

2023 Business Plan

Part C : Marketing and Lead Generation Planning

Lead Source/Audience

#3 Marketing Plan

Advertising to create awareness and consideration

- _____
- _____
- _____
- _____
- _____
- _____

Follow-Up Plan

Repeated communication with non-responsive leads aimed to elicit conversation

- _____
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- _____
- _____

Networking Plan

Socializing to foster referral-producing relationships

- _____
- _____
- _____
- _____
- _____
- _____

Nurturing Plan

Repeated communication with responsive leads aimed to set appointments

- _____
- _____
- _____
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Transactions Goal

Prospecting Plan

Contacting a group of people in search of leads

- _____
- _____
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2023 Business Plan

Part C : Marketing and Lead Generation Planning

Lead Source/Audience

#4 Marketing Plan

Advertising to create awareness and consideration

- _____
- _____
- _____
- _____
- _____
- _____

Follow-Up Plan

Repeated communication with non-responsive leads aimed to elicit conversation

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- _____
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- _____
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Networking Plan

Socializing to foster referral-producing relationships

- _____
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Nurturing Plan

Repeated communication with responsive leads aimed to set appointments

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Transactions Goal

Prospecting Plan

Contacting a group of people in search of leads

- _____
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2023 Business Plan

Part C : Marketing and Lead Generation Planning

Lead Source/Audience

#5 Marketing Plan

Advertising to create awareness and consideration

- _____
- _____
- _____
- _____
- _____
- _____

Follow-Up Plan

Repeated communication with non-responsive leads aimed to elicit conversation

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Networking Plan

Socializing to foster referral-producing relationships

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Nurturing Plan

Repeated communication with responsive leads aimed to set appointments

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Transactions Goal

Prospecting Plan

Contacting a group of people in search of leads

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2023 Business Plan

Part C : Marketing and Lead Generation Planning

Lead Source/Audience

#6 Marketing Plan

Advertising to create awareness and consideration

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Follow-Up Plan

Repeated communication with non-responsive leads aimed to elicit conversation

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Networking Plan

Socializing to foster referral-producing relationships

- _____
- _____
- _____
- _____
- _____
- _____

Nurturing Plan

Repeated communication with responsive leads aimed to set appointments

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Transactions Goal

Prospecting Plan

Contacting a group of people in search of leads

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2023 Business Plan

Part D : Operations Planning

Operations Initiatives

The more productive you are, the more money you make. The more organized you are, the more you can keep your focus. Operations is about streamlining your business and improving efficiencies. Reflect on your business with your coach. What areas can you work on that will have the greatest impact?

What I will do	Priority (Score 1-5) with 5 being most important
<ul style="list-style-type: none"> • Hire an assistant before Q4. • Standardize/formalize my transaction process. • Determine ROIs on lead sources. • Purchase a more robust accounting software – and use it! • Enter my numbers into illūm at the end of each day. • Streamline my open house system (find a sign-in app). 	<p style="text-align: center;">4 5 3 5 4 3</p>

What I will do / Where I need accountability	Priority (Score 1-5) with 5 being most important
<ul style="list-style-type: none"> • • • • • • • • • • • • • • • 	

2023 Business Plan

Part E : Pre-Planning Analysis

Pre-Planning Analysis

SWOT Analysis

A SWOT analysis complements your vision. Your vision tells you where you're going. A SWOT analysis helps describe where you are. With a clear assessment of where you stand, the more effectively you can plan and build a bridge to your future. Write as many points as necessary to be thorough.

Examples

Strengths Creating engaging, informative videos for social media	Weaknesses Non-standardized, inefficient transaction management
Opportunities The agent who dominates the area adjacent my geo farm is retiring, so that area has good farming potential	Threats The competition just opened an office to better serve the area that includes my geo-farm

Internal Factors	Strengths	Weaknesses
	Opportunities	Threats
External Factors		

2023 Business Plan

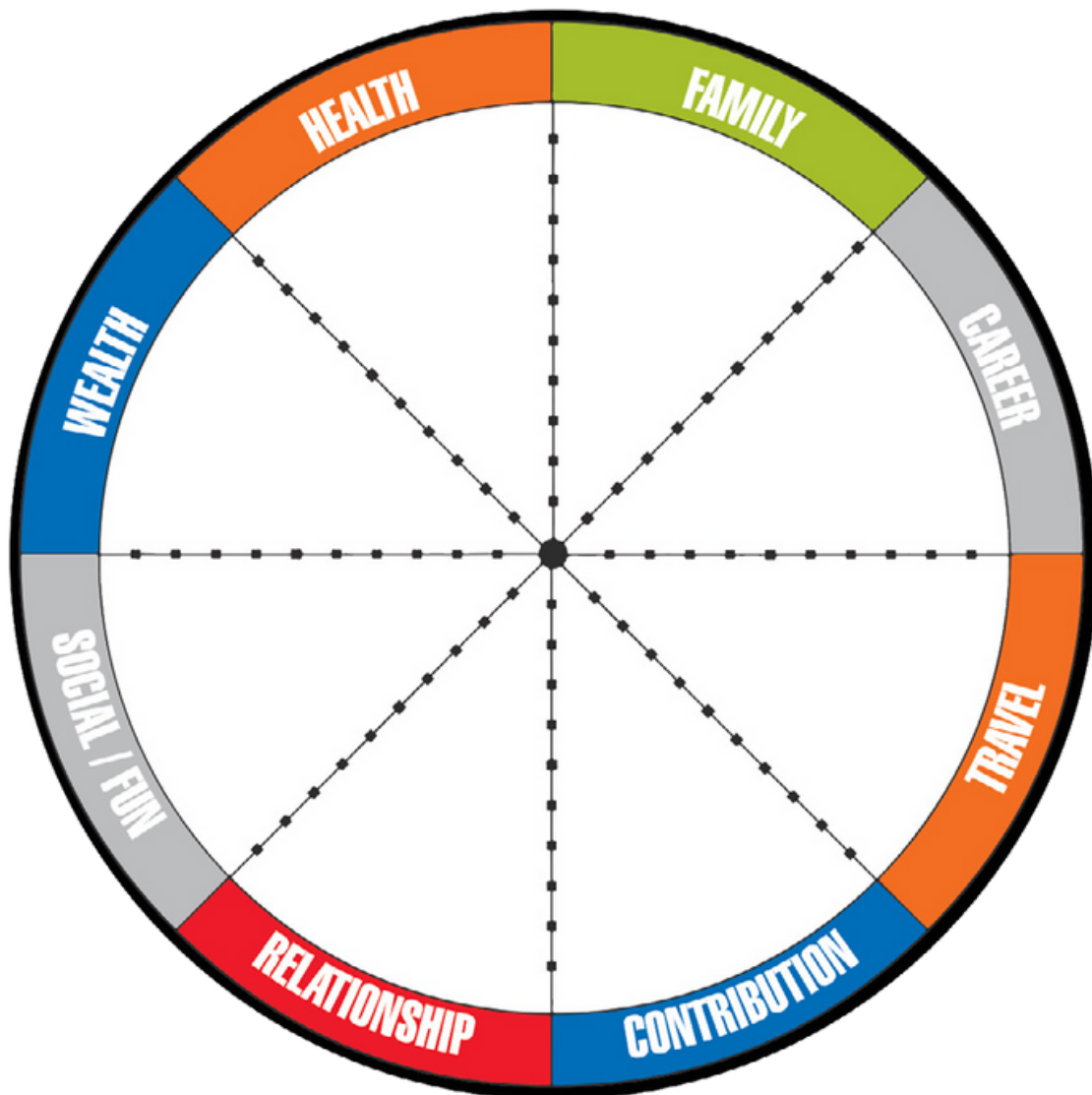
Part F : 8 Equities

Circle of Life

With so much clamoring for our attention, it's easy to lose sight of the big picture. But success is more than a single focus.

In the coming year, what will you do to live a more holistic, balanced and abundant life?

Consider the circle below. Each dot represents 10% of where you want to be. How are you doing in each area? Consider your potential, your obligations and your passions. Fill in each piece of the pie. Then pause to reflect and set some powerful life goals for 2023!



2023 Business Plan

*This is not intended to be used in lieu of professional tax guidance. Calculations for pre-tax contributions as well as business expenses depend on entity structure and other accounting considerations.

*Please enter the eight required inputs

Financial Plan	
Total 2023 GCI Goal	<input type="text"/>
Projected Net Commissions on GCI	<input type="text"/>
Other Real Estate Related Pre-Tax Income	<input type="text"/>
Total Projected Pre-Tax Income	<input type="text"/>
Projected 2023 Tax	<input type="text"/>
Projected Net Income Less Taxes	<input type="text"/>
Post-Tax Income from Other Sources	<input type="text"/>
Projected Net Income from all Sources	<input type="text"/>
Your 2023 Budget (incl. Business Expenses)	<input type="text"/>
Net Income Surplus (Black) / Deficit (Red)	<input type="text"/>

Budget Inputs	Monthly Spend	Annual Spend
Months in Coaching This Year	<input type="text"/>	
Personal Expenses	<input type="text"/>	<input type="text"/>
Business Expenses	<input type="text"/>	<input type="text"/>
Debt Reduction Goal	<input type="text"/>	<input type="text"/>
Pre-Tax Savings Goal	<input type="text"/>	<input type="text"/>
Post-Tax Savings Goal	<input type="text"/>	<input type="text"/>
Post-Tax Income from Other Sources	<input type="text"/>	<input type="text"/>
Combined Federal & State Tax Rate	<input type="text"/>	

How to Allocate Each Commission Check

to Business Account

%

to Personal Account & Pre-Tax Savings

%

to Tax Account

%

My 2023 Personal Expenses



IMPORTANT NOTE: To best calculate these numbers, complete this page using the digital plan in illūm.



Essentials (Savings and Taxes)	Average Monthly Spend	Annual Spend	% of Total Budget
Home			
Transportation			
Medical			
Utilities			
Groceries			
Personal Care			
Family Obligations			
Education			
Lifestyle			
Legal / Professional Counsel			
Donations / Charity			
Other Insurance			
Credit Card / Other Personal Debt Pmnts.			
Other			
TOTAL			

My 2023 Business Expenses



IMPORTANT NOTE: To best calculate these numbers, complete this page using the digital plan in illūm.



Expenses	Average Monthly Spend	Annual Spend	% of Total Budget
License / E&O			
Professional Development / CE / Events			
Coaching			
Office / Desk / Broker / Association Fees			
Communication / Technology			
Legal / Professional Counsel			
Advertising / Marketing			
Assistant Salary			
Transportation / Travel			
Credit Card / Other Business Debt			
Pmnts. Other			
TOTAL			

My Savings and Debts



IMPORTANT NOTE: To best calculate these numbers, complete this page using the digital plan in illüm.



Liquidity	
Cash Available	
Long-Term Debt	
Mortgage 1	
Mortgage 2	
Mortgage 3	
Student Loans	
Other Loans	
TOTAL	
Short-Term Debt	
Credit Card	
Other	
Loans	
Other	
TOTAL	
Tax Debt	
Unpaid Property Taxes	
Unpaid Income Taxes	
Other Loans	
TOTAL	