

MAKE IT HAPPEN

2026 BUSINESS PLANNING WORKBOOK



“Every top producer started with a plan and the courage to follow it.”

AGENDA

8:45 – 9:00 | Welcome & Mindset

9:00 – 10:15 | Reflect & Review

10:15 – 10:30 | Break

10:30 – 11:45 | Setting 2026 Goals

11:45 – 12:45 | Lunch & Sponsor

12:45 – 2:00 | Building the Business Plan

2:00 – 2:15 | Break

2:15 – 2:45 | Accountability & Execution

2:45 – 3:00 | Wrap-Up & Commitments

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HOW ARE YOU DOING?

Before you start building your business plan, take a moment to evaluate where you are right now, personally and professionally.

Your business can only grow as much as you do.

DOING WHAT I LOVE

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

NOT VERY

EXTREMELY

MAKING A DIFFERENCE

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

NOT VERY

EXTREMELY

RUNNING A THRIVING BUSINESS

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

NOT VERY

EXTREMELY

SPENDING TIME WITH PEOPLE I LOVE

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

NOT VERY

EXTREMELY

CARING FOR MYSELF

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

NOT VERY

EXTREMELY

HAVING FUN

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

NOT VERY

EXTREMELY

YEAR IN REVIEW

THE BIG THREES

What are the three greatest things that happened this year?

What three things are you most proud of this year?

Who or what were your three greatest influences this year?

YEAR IN REVIEW

THE BIG THREES

What were the three toughest parts of the year?

What are three things you would have done differently?

What are three lessons you learned this year?

YEAR IN REVIEW

THE BIG THREES

What are three things you want to do more of?

What are three things you want to do less of?

What are three things you want to stop doing?

YEAR IN REVIEW HIGHLIGHTS

What is the biggest risk you took? And, how did that go?

What is the smartest decision you made this year? Why?

Which relationship was most-improved this year?

What one word best summarizes this year?

WHAT IS YOUR SOMEDAY GOAL?

Where are you today? (Personally, financially, professionally — what's your current starting point?)

Where do you want to be in 3–5 years? (Describe the life you want — not just your business.)

What are you working toward right now? (What's the goal that lights you up?)

Why does that matter to you? (What's the emotional reason behind your goal?)

What gets you up in the morning? (What motivates you to take action even when it's hard?)

Who are you doing this for? (Yourself, your family, your future, your legacy... name it.)

How will your life look once you've reached that "someday" goal? (Where are you living, what are you doing, who's with you?)

What would be different in your life if you accomplished this? (Confidence, freedom, time, stability, pride — be specific.)

MY 2026 PRODUCTION & LIFE GOALS

Summarize the vision you created in “What Is Your Someday Goal.” Write a few sentences that describe what you want your life and business to look like by December 2026.

KNOW YOUR NUMBERS

Category	Goal	Why It Matters to Me
Desired Take Home		
Expenses Monthly		
Average Commission		
Units/Volume		
Days Off/Vacations		
Personal Development		

MY 2026 PRODUCTION & LIFE GOALS CONTINUED...

SMART Goals for 2026

Use the SMART method to set one goal for each area below.

Business Growth

Financial

Personal / Lifestyle

What Success Looks Like

If you achieve these goals, how will life look different next year?

What's one word that captures your focus for 2026?

PROSPECTING VS MARKETING

Lead Generation Strategy: Choose Your 3 Pillars

(Choose ONLY three you can commit to weekly)

<input type="checkbox"/> Cold Calling	<input type="checkbox"/> Door Knocking	<input type="checkbox"/> FSBOs	<input type="checkbox"/> Open Houses
<input type="checkbox"/> Networking	<input type="checkbox"/> Past Client F/U	<input type="checkbox"/> Social Media	<input type="checkbox"/> Farming
<input type="checkbox"/> Online Leads	<input type="checkbox"/> Events	<input type="checkbox"/> Referrals	<input type="checkbox"/> Branding

Why did you choose these 3?

Marketing Plan: Brand + Budget + Content

What 3 words do you want people to associate with your brand?

Marketing Budget for 2026

Projected annual spend: \$_____

Monthly marketing budget: \$_____

Prospecting Budget for 2026

Projected annual spend: \$_____

Monthly prospecting budget: \$_____

Prospecting Plan: Daily/Weekly Action

(What outbound activities will you commit to? Choose 1-2 and be consistent.)

Examples: Database calls, "10 Conversations a Day", Open House Follow-Up, FSBO/Expired Outreach, Door Knocking, Investor Outreach

1. _____

2. _____

Top Marketing Channels You Will Use

(Example: Instagram Reels, Email Newsletter, Community Events, Facebook Advertising, Open Houses)

PROSPECTING VS MARKETING CONTINUED...

Content Plan Aligned to Your Lead Pillars

(Write 2–3 content ideas that support each lead pillar)

#1 _____

#2 _____

#3 _____

Systems & Operations: Support for Your Growth

Which systems do you currently have in place?

Systems You Need to Add or Improve for 2026

What Can Support These Systems?

Your 2026 Action Summary

3 habits that will define your business success next year:

#1 _____

#2 _____

#3 _____

1-3-5 SUCCESS PLAN

Goal:

Objective:

Objective:

Objective:

Strategies:

1.

2.

3.

4.

5.

2026 TAKE-HOME ACTION PLAN PACKET

My 2026 Commitments

1. My #1 Focus Area: _____
2. My Growth Commitment: _____
3. My Personal Promise: _____

Agent

Accountability Partner

Signed: _____ Date: _____ Signed: _____ Date: _____

“Success is built one consistent week at a time.”

Month	Units	Volume	Actual	Sources	Adjustments Needed
Jan					
Feb					
Mar					
Apr					
May					
Jun					
Jul					
Aug					
Sept					
Oct					
Nov					
Dec					

2026 TAKE-HOME ACTION PLAN PACKET CONTINUED..

90-Day Action Plan Worksheet

Focus Area	Action Steps (Next 90 Days)	Deadline	Accountability Partner
Lead Generation			
Marketing			
Systems/Operations			
Personal Growth			

Business Planning Summary

2026 Income Goal: _____

of Closings Needed: _____

Top 3 Lead Sources: _____

Word of the Year: _____

Accountability Partner: _____

HOW TO WIN THE DAY?

November 2025

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

WHAT DOES YOUR PERFECT DAY LOOK LIKE?

Example

- 8-8:15: Affirmation
- 8:15-8:45: Scripts
- 8:45-9:00: Prep/Break
- 9-11:30: Lead Gen
- 11:30-12:30: Lunch
- 12:30-2:00: Data Entry
- 2:00: Appointment

5:00 A		3:00 P	
5:30 A		3:30 P	
6:00 A		4:00 P	
6:30 A		4:30 P	
7:00 A		5:00 P	
7:30 A		5:30 P	
8:00 A		6:00 P	
8:30 A		6:30 P	
9:00 A		7:00 P	
9:30 A		7:30 P	
10:00 A		8:00 P	
10:30 A		8:30 P	
11:00 A		9:00 P	
11:30 A		9:30 P	
12:00 P		10:00 P	
12:30 P		10:30 P	
1:00 P		11:00 P	
1:30 P		11:30 P	
2:00 P		12:00 P	
2:30 P		12:30 P	

AUDIT YOUR TIME

Be brutally honest with yourself, and don't exaggerate. Detail your actions in 15-minute increments for a minimum of three business days. Then, take stock of your results and evaluate what you need to change.

Date	5:00 A		3:00 P	
	5:30 A		3:30 P	
	6:00 A		4:00 P	
	6:30 A		4:30 P	
Day of the Week	7:00 A		5:00 P	
	7:30 A		5:30 P	
	8:00 A		6:00 P	
	8:30 A		6:30 P	
	9:00 A		7:00 P	
	9:30 A		7:30 P	
	10:00 A		8:00 P	
	10:30 A		8:30 P	
	11:00 A		9:00 P	
	11:30 A		9:30 P	
	12:00 P		10:00 P	
	12:30 P		10:30 P	
	1:00 P		11:00 P	
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	2:00 P		12:00 P	
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	9:30 A		7:30 P	
	10:00 A		8:00 P	
	10:30 A		8:30 P	
	11:00 A		9:00 P	
	11:30 A		9:30 P	
	12:00 P		10:00 P	
	12:30 P		10:30 P	
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	9:30 A		7:30 P	
	10:00 A		8:00 P	
	10:30 A		8:30 P	
	11:00 A		9:00 P	
	11:30 A		9:30 P	
	12:00 P		10:00 P	
	12:30 P		10:30 P	
	1:00 P		11:00 P	
	1:30 P		11:30 P	
	2:00 P		12:00 P	
	2:30 P		12:30 P	

ACCOUNTABILITY & EXECUTION EXERCISE

Name: _____

Date: _____

Know Your Numbers

To grow your business, you need to know your numbers — every week.

Fill out your targets below to create your personal KPI dashboard.

	Weekly Goal	Actual (This Week)	Notes
New Leads			
Conversations/Contacts Made			
Appointments Set			
Listings Taken			
Buyers Under Contract			
Closings			
Social Media Posts			
Open House/Events			
Follow Up Sessions			
CRM Input			
Updated Dashboard			
Planner/Calendar			
Visual Tracker			

ACCOUNTABILITY & EXECUTION EXERCISE CONTINUED...

Accountability Partner or System

Who or what will help you stay consistent?

Accountability Partner/Group: _____

How Often You'll Check In: _____

Method (Call, Text, Meeting): _____

“Who challenges you to stay focused — not just motivated?”

“Would you show up differently if you had to report your numbers weekly?”

Tools & Tracking

Decide how you'll measure and visualize your progress.

Tools/Systems	What It Tracks	Frequency	Notes
CRM			
Dashboard/Spreadsheet			
Planner/Calendar			
Whiteboard/Visual Tracker			

Tip: Keep your tracker visible — on your desk, in your planner, or digitally (Lofty, Google Sheet, etc.).

ACCOUNTABILITY & EXECUTION EXERCISE CONTINUED...

Reflection & Commitment

Weekly reflection questions (fill out every Friday):

- What went well this week? _____
- What needs more focus next week? _____
- Did I hit my key metrics? ☐ Yes ☐ No
- If not, what will I adjust? _____

My 2026 Accountability Commitment

Write one statement you can look back on when motivation dips:

"In 2026, I will stay consistent by _____."

"I will measure success not just by results, but by _____."

FORECAST VS. ACTUAL

Knowing your numbers is one of the most powerful steps you can take in your business. Monthly goals can help you know exactly where you stand, confirm the work you're doing, and motivate you to work harder where it's needed.

	LAST YEAR		PROJECTED		ACTUAL		DELTA	
	UNITS	VOLUME	UNITS	VOLUME	UNITS	VOLUME	UNITS	VOLUME
JAN								
FEB								
MAR								
APR								
MAY								
JUN								
JUL								
AUG								
SEPT								
OCT								
NOV								
DEC								