

# MAKE IT HAPPEN

2026 BUSINESS PLANNING WORKBOOK

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“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

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
NOT VERY					EXTREMELY				

## MAKING A DIFFERENCE

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
NOT VERY					EXTREMELY				

## RUNNING A THRIVING BUSINESS

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
NOT VERY					EXTREMELY				

## SPENDING TIME WITH PEOPLE I LOVE

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
NOT VERY					EXTREMELY				

## CARING FOR MYSELF

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
NOT VERY					EXTREMELY				

## HAVING FUN

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
NOT VERY					EXTREMELY				

# YEAR IN REVIEW

# THE BIG THREES

**What are the three greatest things that happened this year?**

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**What three things are you most proud of this year?**

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**Who or what were your three greatest influences this year?**

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# YEAR IN REVIEW

# THE BIG THREES

**What were the three toughest parts of the year?**

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**What are three things you would have done differently?**

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**What are three lessons you learned this year?**

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# YEAR IN REVIEW

# THE BIG THREES

What are three things you want to do more of?

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What are three things you want to do less of?

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What are three things you want to stop doing?

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# YEAR IN REVIEW HIGHLIGHTS

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

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

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**Which relationship was most-improved this year?**

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**What one word best summarizes this year?**

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# 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.

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## 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

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#### Financial

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#### Personal / Lifestyle

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## What Success Looks Like

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

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

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# 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?

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## Marketing Plan: Brand + Budget + Content

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

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### 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)

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# 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?*

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## Systems You Need to Add or Improve for 2026

*What Can Support These Systems?*

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## 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	
	1:30 P		11:30 P	
	2:00 P		12:00 P	
	2:30 P		12:30 P	

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	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	
	2:30 P		12:30 P	

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	7:30 A		5:30 P	
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	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	

# 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 \_\_\_\_\_.”

