

*Three Sixty*  
{REAL ESTATE}  
PLANNER

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*We are in the  
business of HOME*

# USING THIS {REAL ESTATE} PLANNER

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This {real estate} planner can be used if you are brand new, a seasoned agent, just need to be kept accountable, and for the agent whose business continues to grow. The goal setting and accountability trackers in this planner will work for everyone.

*"wake up in anticipation that something great is going to happen today!"*

## *goal setting*

This is where you are going to **CREATE AND BREAK DOWN YOUR 1, 3 AND 5 YEAR GOALS**. Kind of like you are creating your very own road map for how to be a kick-ass real estate agent. To be frank, goal planning is one of the most important parts of success.

Don't rush this section. **DIVE IN. BE REALISTIC** and then **BE INSPIRED. DREAM BIG.**

## *your business*

Three Sixty strives to offer training in every aspect of our business, but this is just that, **YOUR BUSINESS**. We've added some sections to this planner to give you the ability to let us know what you feel you need from us in order to be successful.

## *lead generation*

We talk all the time about "prospecting" and "farming" for new leads. Some people thrive in this arena and some don't. **DO YOU NEED HELP GETTING LEADS?** Do you want company generated leads and are you willing to complete these for a different commission split? This is the section to tell us your plan or to ask us for help.

## *what can three sixty do for you?*

**WE HAVE A LOT OF RESOURCES AVAILABLE FOR YOU**, which we will discuss throughout the year in coaching sessions. In this section, tell us what you might need to have at your fingertips in order to be successful. Your own customized landing page? A new CRM platform for tracking prospects, your pipeline, transactions, etc.? Put it all down on paper and let's discuss it!



*"the thing is, it's very easy to be different, but very difficult to be better."*  
JONATHAN IVE

## *daily priorities 1-2-3*

Every single night before you lay your pretty little head on your pillow and dream about that yacht life, **WRITE DOWN TOMORROW'S TOP 3 PRIORITIES.**

**KNOWING WHAT YOU HAVE TO DO** tomorrow before you go to bed prepares you **MENTALLY** for the next day. It's more psychological than you know. Take a look at your appointments for the day and know what must get done to make tomorrow a success.

## *weekly recap*

When you **TRACK YOUR GOALS WEEKLY**, you are **CREATING CONSTANT ACCOUNTABILITY.** The Weekly Recap is a guided reflection of your accomplishments, your prospecting, and the areas where you want to improve.

Each week will be different than the last few challenges, deadlines, and time crunches. The Weekly Recap is an important tool that will keep you mindful of where and how you are spending your time.

## *monthly outlook*

Consider the Monthly Outlook the sky view of the Weekly Recap. By taking the time to plan out the new month at hand, you are actually planning for success.

**EACH MONTH YOU WILL LOOK TO IMPROVE UPON THE LAST** and **CHALLENGE YOURSELF** to break the status quo.

## *must-do quick list*

This is **LITERALLY THE "GET SHIT DONE" SECTION.** You'll always have a list of things that need your attention, and most of the time it's going to be tasks that won't make you money. But they still have to be done. The best way to stay on top of the ball is to be aware of where your attention is needed and cross it off **ASAP** so you can move on to the **MONEY MAKING.**

*"teamwork makes the dream work."*



*"if everyone is moving together, then  
success takes care of itself."*  
ABRAHAM LINCOLN

## *pipeline quick look*

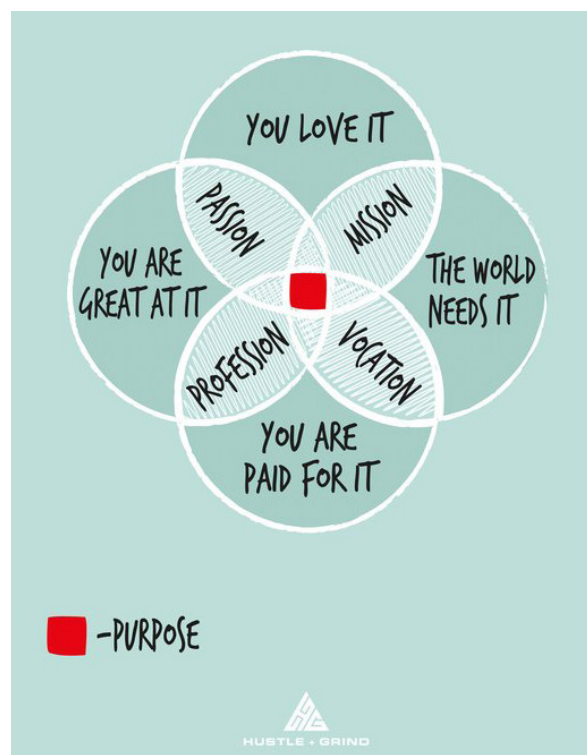
Knowing where your clients are is the best way to track your progress and your pipeline. ALWAYS keep this section updated (use a pencil so you can make adjustments as needed).

## *prospect tracker*

The Prospect Tracker is your DAILY reminder that these touch points are to be done every single day. There are no days off when it comes to prospecting **EVERY. SINGLE. DAY.** Remember, what you do today equals a paycheck in 90 days!

## *expense & mileage tracking*

This is a no-brainer. You MUST keep track of every dollar you spend and every mile you drive. There are tons of apps and services and what nots that can track this for you, but writing down that you spent \$400 on lunches might change the way you spend when you see it on paper every week. Also, if you get in the habit of tracking your mileage now, come next year when you're getting everything in order for your taxes, you'll thank yourself for having a simple system in place that saves you so much time .





**ENVISION YOUR FUTURE LIFE. WHAT ARE 7 SPECIFIC THINGS THAT YOU WANT TO ACCOMPLISH DURING THE NEXT 5 YEARS?**

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_
- 6) \_\_\_\_\_
- 7) \_\_\_\_\_

Additional? \_\_\_\_\_

**WHAT ARE SOME ACTION ITEMS THAT YOU WILL NEED TO ACCOMPLISH IN ORDER TO ACHIEVE THESE GOALS?** (example: Goal - Purchase an investment property. Action Items - Talk to a lender. Determine what I can afford. Decide what down payment will be needed. If you will pay cash, how will you best save the money?)

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# GOAL WORKSHEET: REVERSE ENGINEERING

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Congratulations on writing your vision! Now it's time to pull some 10-year goals from that vision and trickle them back. Choose a 5 year goal in either personal, career, or health and plug it into this worksheet.

	<i>personal</i>	<i>career</i>	<i>health</i>
<b>5 YEAR GOAL</b>			
		<i>to get to my 5 year goal, I will...</i>	

	<i>personal</i>	<i>career</i>	<i>health</i>
<b>3 YEAR GOAL</b>			
		<i>to get to my 3 year goal, I will...</i>	

	<i>personal</i>	<i>career</i>	<i>health</i>
<b>1 YEAR GOAL</b>			



# GOAL WORKSHEET: INSPIRED ACTION PLAN

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Once you know what your goals are - it is time to develop an action plan. What are some specific things that you can do on a monthly, weekly, and daily basis that will move you closer to achieving your goal?

## THINGS I CAN START DOING MONTHLY...

January

February

March

April

May

June

July

August

September

October

November

December

## NEW HABITS I CAN START DOING WEEKLY...

## NEW HABITS I CAN START DOING EVERY DAY...

\*Check out the inkWELL Press "Goal Assessment" sheet at the back to drill down on a specific goal you set.





# GOAL PLANNING: CRUNCHING THE NUMBERS

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Do you know how many contacts you need in order to hit your sales goal? Or how many appointments you need? The National Association of REALTORS® Average Statistics for Prospecting Conversions states that you need the following:

*35 contacts for 1 appointment  
4 appointments for 1 sale*

## EXAMPLE

Average Sales Price	<u>\$265k</u>
Your Average Commission	<u>\$ (2.5%)</u>
This Year's Goal	<u>\$5m sales / \$125k gross income</u>
*3 year Revenue Goal	<u>\$8.5m sales / \$212k gross income</u>
*5 year Revenue Goal	<u>\$13m sales / \$325k gross income</u>

\*Your annual goals should increase by 30% year-over-year due to repeat clients and client referrals.

## ANNUAL GOAL

Sales Goal \$5m sales / Average Sales Price \$265k = (# of sales needed) 19 transactions

Sales Needed 19 transactions x 4 appointments = 76 appts

Appointments needed 76 x 35 contacts = 2,660 contacts

## MONTHLY GOAL

Appointments needed 76 / 12 months = 6.3 appts/mo

Contacts Needed: 2,660 / 12 months = 222 contacts/mo



Now it's your turn! In order to break down these GOALS, we need to determine a few things. You may need to ask your Broker or look at your past year's sales. If you're brand new and just have no idea where to start, pick a city, neighborhood or community that you plan to focus on and look up the sales for the past year to calculate these numbers.

Average Sales Price .....

Your Average Commission .....

This Year's Goal .....

\*3 year Revenue Goal .....

\*5 year Revenue Goal .....

\*Your annual goals should increase by 30% year-over-year due to repeat clients and client referrals.

**ANNUAL GOAL**

Sales Goal ..... /Average Sales Price ..... = (# of sales needed) .....

Sales Needed ..... x 4 appointments =

Appointments needed ..... x 35 contacts = .....

**MONTHLY GOAL**

Appointments needed ..... /12 months = .....

Contacts Needed: ..... /12 months = .....

**THINK ABOUT YOUR GOALS - AND HOW THEY ARE APPLICABLE TO YOUR INCOME. DO YOU KNOW WHAT YOUR INCOME GOAL NEEDS TO BE IN ORDER TO OBTAIN YOUR GOALS?**

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# Three Sixty CORE VALUES

THREE SIXTY IS PROUD to offer services in real estate, property management, interior design, and resort living properties. Each part of our company operates with the same set of CORE VALUES that has made Three Sixty so special.

## AUTHENTIC

[aw-then-tik]: representing one's true nature or beliefs; true to oneself or to the person identified: *Our Three Sixty agent had an authentic desire to find us the right property for our home.*

## DRIVEN

[driv-uh n]: being under compulsion, as to succeed or excel; highly energetic: *Three Sixty team members are driven to provide the best experience for our clients.*

## SERVICE ORIENTED

[sur-vis ohr-ee-entid]: having a primary focus on helping people: *Our service oriented approach at Three Sixty means that we are there for all of our clients' real estate needs. Whether it's buying or selling a home, finding contractors to do work or decorating a home or business, we can help!*

## TEAM SPIRITED

[teem spir-i-tid]: feelings of camaraderie among the members of a group, enabling them to cooperate and work well together: *#bestteamever isn't just a hashtag. We foster a team spirited atmosphere and to make our time spent together feel like a family gathering.*

## COMMUNITY MINDED

[kuh-myoo-ni-tee mahyn-did]: being interested in helping the wider community; socially concerned: *Being community minded means we can make an impact that is bigger than any one of us could make by ourselves. We give back and do more, whether through community clean-ups for Earth Day or our October giving campaign.*

## PASSIONATE

[pash-uh-nit]: expressing, showing, or marked by intense or strong feeling: *Each part of our company, real estate, property management, and interior design, is full of passionate professionals who love what they do every day.*

## FUN

[fuhn]: providing entertainment, amusement, or enjoyment: *At Three Sixty, we like to work hard, but we love to play hard too. Fun is an important pillar of what we do together as a company.*

## PROFESSIONAL

[pruh-fesh-uh-nl]: exhibiting a courteous, conscientious, ethical, and generally businesslike manner in the workplace: *You can expect a professional experience from start to finish when you deal with anyone at Three Sixty.*

## STYLE & DESIGN FOCUSED

[stahyl and dih-zahyn foh-kuhsd]: keeping current home décor trends at top of mind: *Our Interiors team has a style & design focused approach, helping clients tell a story in their home, with individuality and timeless charm.*

## INDUSTRY EXPERT

[in-duh-stree ek-spurt]: knowing every aspect of market trends and research; taking advantage of continuing education opportunities to further professional knowledge: *At Three Sixty, we encourage every team member to take advantage of educational opportunities to continuously develop additional industry expertise.*



# WEEK OF:

## must-do quick list

Tasks that don't generate income

1.	
2.	
3.	
6 AM	2 PM
7 AM	3 PM
8 AM	4 PM
9 AM	5 PM
10 AM	6 PM
11 AM	7 PM
12 PM	8 PM
1 PM	9 PM write tomorrow's priority list <input type="checkbox"/>

Monday

## pipeline quick look

Listings	Status
Buyers	Status

1.	
2.	
3.	
6 AM	2 PM
7 AM	3 PM
8 AM	4 PM
9 AM	5 PM
10 AM	6 PM
11 AM	7 PM
12 PM	8 PM
1 PM	9 PM write tomorrow's priority list <input type="checkbox"/>

Tuesday

## prospect tracker

Activity	Number
Prospect Calls Made	
Notecards Sent	
Popbys Delivered	
Business Cards Given	
Business Cards Received	

1.	
2.	
3.	
6 AM	2 PM
7 AM	3 PM
8 AM	4 PM
9 AM	5 PM
10 AM	6 PM
11 AM	7 PM
12 PM	8 PM
1 PM	9 PM write tomorrow's priority list <input type="checkbox"/>

Wednesday



# WEEK OF:



*thursday*

1.	
2.	
3.	
6 AM	2 PM
7 AM	3 PM
8 AM	4 PM
9 AM	5 PM
10 AM	6 PM
11 AM	7 PM
12 PM	8 PM
1 PM	9 PM write tomorrow's priority list <input type="checkbox"/>

## *monthly goals*

Item	Goal
# of New Contacts	
# of Appts	
# of New Listings	
# of Sales	
# of Leases	
# of Referrals	
Total \$\$ Sold	

*friday*

1.	
2.	
3.	
6 AM	2 PM
7 AM	3 PM
8 AM	4 PM
9 AM	5 PM
10 AM	6 PM
11 AM	7 PM
12 PM	8 PM
1 PM	9 PM write tomorrow's priority list <input type="checkbox"/>

## *expense tracking*

Item	Cost

*saturday*

*sunday*

	plan for next week <input type="checkbox"/>

*mileage*

Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Sunday	
Total Weekly Miles	



# WEEKLY RECAP

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**REFLECT ON THE PAST WEEK - WHAT ARE SOME THINGS THAT WENT WELL, AND WHAT DID NOT GO WELL?**

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**DID YOU HIT YOUR BUSINESS GOALS? IF NOT, IDENTIFY WHAT MAY BE BLOCKING YOU. WHAT CAN YOU CHANGE FOR NEXT WEEK?**

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**WHAT ARE YOUR BIGGEST PRIORITIES FOR NEXT WEEK? HOW CAN YOU MAKE THIS WEEK EVEN BETTER THAN LAST?**

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# Three Sixty COMMITMENTS

## TECHNOLOGY

Three Sixty has embraced multiple ways we can utilize technology to make the home buying experience more efficient and effective for you. No longer is there even a chance of a missed opportunity because of having to go back to the office to pull files or sign paperwork. By working in “the cloud”, everything is at our fingertips wherever and whenever we need it! These practices don’t just benefit you. We have found that, in addition to providing a great customer experience, our commitment to technological solutions increases our business efficiency, and allows us to close more deals through utilizing effective processes.

## SUSTAINABILITY

At Three Sixty, our primary goal is to achieve the most effective solutions for our clients. These days, that means finding ways to be more mindful of the environment. There are a multitude of sustainable solutions available that will keep your operating costs down and lower the impact that your home or business has on our natural surroundings. From the simple use of a programmable thermostat to the implementation of complex concepts like Smart Growth, Three Sixty’s team of experts will be there to guide you to the most cost effective and resource efficient solution.

We are passionate about using space and materials wisely and in a cost effective manner. We care about the environment and our community. It is from that perspective that we run our business and help our clients to do the same thing.

## COMMUNITY

At Three Sixty, it’s not just about selling real estate. We believe our community is a great place to live and work and raise a family, and we want to do everything we can to help members of our community have a better life. We started our company with a foundation of service and as we’ve grown, we are proud to say that our team represents people of all different walks of life who are involved in all different aspects of our community.

