

IMPORTANT: Tips for creating your plan:

- **YOU MUST** save this PDF to your computer and open in Adobe Acrobat.
- The data below is SAMPLE data. Please replace the data with your information to create your plan.
- **Do NOT hit [ENTER]** after entering data in a field.
ONLY hit [TAB] or mouse click in next field to move on.
- You must fill in ALL data on THIS page for calculations to work.
- You CAN come back and change your answers.
- Lots of items have hyperlinks, just click to open them.
- Questions or issues, please email Tom - TechHelp@CBDanforth.com

After completing your plan, click below to go directly to the:

Personalized 2018 Business Plan

REQUIRED DATA – All of these fields must NOT be empty.

First Name	
Last Name	
Days per week you work	
Average hours per day you work	
Days of annual vacation to plan for	
Sick days to plan for	
Average net check per side last year	(Average of all CBD Brokers is \$12,100)
Total income earned last year	
Target listing transaction sides	%
Target annual gross income	
Hours per day you prospect	

BusinessPlan2018La.pdf

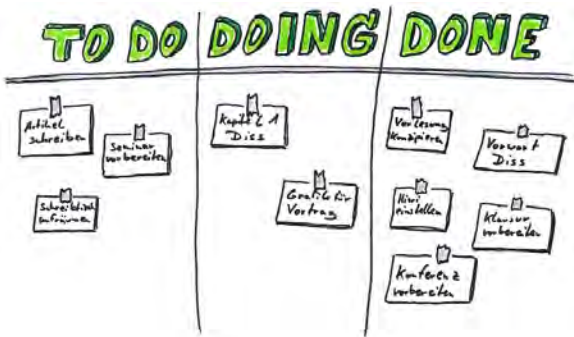
2018 Business Plan for

The success of your plan depends on the amount of effort you invest in it. Based on the survey you completed:

1. Work Commitment: I plan on working ____ hours per day, ____ days per week.

Observations:

- A large part of success is being in the right place at the right time.
- Successful brokers find themselves in a variety of places which insures they will be in the right place at the right time.



Recommendations:

- Reviewing your day and planning your next day should be done at the beginning or end of every day.
- Spend at least an hour 1st thing every day **improving your business** before you start **working in your business**.
- Create and use a Do, Doing, Done board like Tom Ferry describes in this [quick video](#).

Commitments:

- My average day will start at (time)
- I plan on reviewing my written goals for the day and identifying the top three objectives.
- I will design my "perfect week" which will include:
 - Time with family and friends
 - Physical activities
 - New business development (Future)
 - Active clients (Present)
 - Pending transactions (Past)



Ample income provides you options to live a life by intention.

2. Income Goal: This year I will close a total of _____ transaction sides, _____ (_____) will be from my listing inventory to generate my overall goal of at least \$_____.



Dollars Earned	Same as Last Year	Target	Last Year +25%	Last Year Doubled
Annually				
Monthly				
Weekly				
Daily				
Hourly				

***The numbers above account for your vacation and sick days*

Observations:

- The most successful brokers identify the source of each of their transactions.
- Per your income goal, your time is worth \$_____ per hour.
- Many of your tasks can be done more cost effectively by others.
- Providing for yourself and family is an important objective worthy of your effort.



Recommendations:

- Eliminate the least productive prospecting and focus on the successful ones.
- Evaluate using a transaction coordinator or assistant.
- Prioritize your time.

Commitments:

- I will work smarter not harder.
- I will spend more time with my top sources of referrals and income, treating them to something special every time they give me a lead.
- I will eliminate distractions and other things that keep me from my income goal.



A solid business budget will make sure you enjoy the benefits of your work. Below are National Association of Realtor (NAR) guidelines.

3. Budget Plan: NAR recommends spending no more than \$_____ (33%) of your \$_____ income on business expenses and no more than \$_____ (33% of expenses) on marketing.

\$_____ Marketing (NAR recommends less than \$_____ 33% of your expenses)
\$_____ Supplies
\$_____ Memberships/Dues
\$_____ Automobile
\$_____ Insurance
\$_____ Equipment & Technology
\$_____ Telephone
\$_____ Education / Clock Hours & Certifications
\$_____ Retirement
\$_____ _____
\$_____ _____
\$_____ _____
\$_____ **Total** (NAR recommends less than \$_____ ~ 33% of your income)
\$_____ **Net Income** before income taxes

Observations:

- Budgeting for income taxes by setting aside money from each check and making quarterly estimated income tax deposits saves you time and money in the long run. (Never use this money for anything other than taxes!)
- Use of a professional tax advisor throughout the year limits surprises at tax time.
- Closely and regularly monitoring your budget will allow you to make adjustments as needed to stay on target.

Recommendations:

- Your budget should account for every dollar.
- Use a separate business checking account.
- Use a dedicated business credit card.
- Use a dedicated business savings account.

Commitments:

- I will meet with a tax advisor in the first quarter.
- I will run my business like a business keeping all business expenses and receipts separate from personal.
- I will review my budget on a regular basis, at least twice a month.



Prospecting is the life blood of your business.

4. Prospecting Goal: Most, if not all, of your success depends on your prospecting efforts:



Contacts Needed	Same as Last Year	Target	Last Year +25%	Last Year Doubled
Annually				
Monthly				
Weekly				
Daily				

Prospecting Activities - Rate each: **Doing** Now, Planning **To Do** or will **Never** Do

_____ REO	_____ Foreclosure	_____ Client Newsletter
_____ FSBO's	_____ Open Houses	_____ Friends and Family
_____ Website	_____ Vacant Land	_____ Out of State Owners
_____ Engaged	_____ Social Media	_____ Up Size / Down Size
_____ Married	_____ Telemarketing	_____ Prospect Newsletter
_____ Drafted	_____ Door Knocking	_____ Farming - Geographic
_____ Promoted	_____ Service Groups	_____ Farming - Price Range
_____ 2nd Homes	_____ Expired Listings	_____ Farming - Specialty Property
_____ Short Sale	_____ Tenant / Renters	_____ 1st time Buyer Seminars
_____ Relocation	_____ Orphaned Clients	_____ Tenant Occupied Listings
_____ Direct Mail	_____ New Construction	

Observations:

- You will do the prospecting you enjoy the most. Pick things you like to do, or at least activities you do not hate doing.
- Many brokers rule out a specific type of prospecting before giving it an honest try.
- Warm/Active prospecting is the least expensive and most effective.

Recommendations:

- Spend 1 to 3 hours of each day prospecting.
- Go where people congregate. Be social the old fashion way, in person!
- Don't eat alone.
- Read or reread *How to Win Friends and Influence People* by Dale Carnegie.

Commitments:

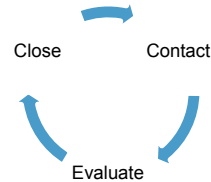
- I will keep track of my top _____ prospects and make sure to communicate with them several times per week.
- I will meet new people and get to know them by having great conversations.
- I will be interested in people's lives and know what is happening that may create a real estate need by being a good listener.

Implementing a plan for consistent and effective communication with your clients and prospects pays huge dividends.

5. Communication with contacts:

The Cycle of Success consists of three items applied consistently over time to a prospect.

The first step in the cycle is **CONTACT**.
The second step in the cycle is **EVALUATE**.
The third step in the cycle is **CLOSE**.



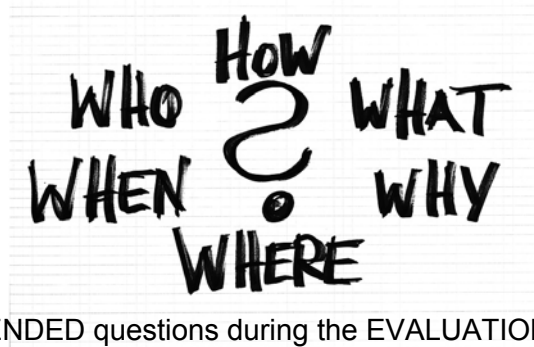
CONTACT: Any time you have a conversation with someone that is more than just social greetings. The best contacts are in **PERSON** or by **TELEPHONE**. Emails and text messages only count as part of this process when they are interactive.

My daily contact target is _____ meaningful conversations.

EVALUATE: Once you make contact, start listening for real estate related cues.

Real Estate Related Cues:

Bigger Family	Marriage	Divorce	Death	Birth
Smaller Family	Job Change	_____	_____	_____



Ask **PROBING**, **OPEN ENDED** questions during the **EVALUATION**.

Probing Questions Start With:

Who What Why When How

They can't be answered with a yes or no.

Make sure you understand the **MOTIVATION** and **URGENCY** of your prospect.

Once you hear a real estate related cue, move to an appropriate **CLOSE**.

CLOSE: A **CLOSE** is asking for a specific next step or contact.

Examples of a **CLOSE**:

What time may we get together next week to discuss your needs?
Would next Tuesday or Friday work better for you?

Each step of the **CYCLE** of **SUCCESS** is repeated until you reach a buying or selling decision.

The biggest lie I tell myself is
“I don’t need
to write that down,
I’ll remember it.”



Observations:

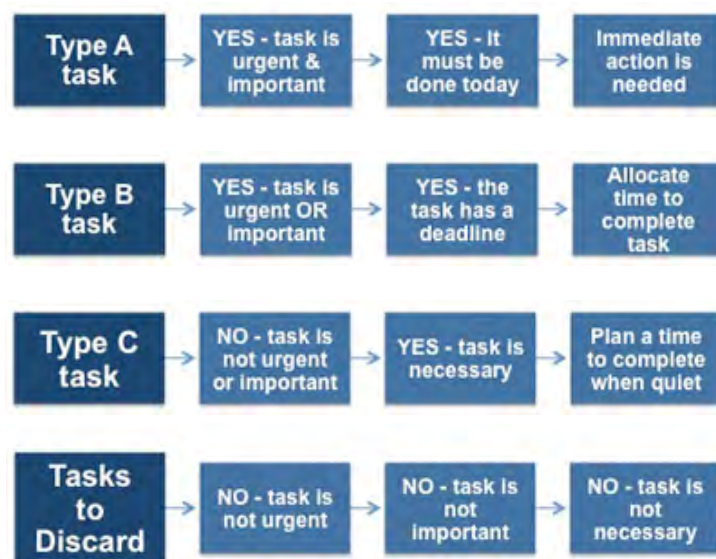
- Keeping good notes allows you to continue the conversation each time you interact.
- Top brokers keep track of prospects with a CRM program. (See page 25)
- It takes an average of 3-5 contacts with a prospect before you convert them to a client.
- Robert Dunbar's optimum number of quality contacts is 150.

[Link to more information on Dunbar's Number](#)



Recommendations:

- Make sure you achieve your contact goal each day.
- Identify your ten best prospects or lead givers and do something with them at least weekly.
- Prioritize prospects by the ABC Method or some other method showing their urgency.
- Select a minimum of 2 contacts per day to mail hand written notes to.



Commitments:

- I will have _____ contacts in my CRM.
- I will upgrade my CRM by _____.
- I will **touch** each contact no less than four times each year.

Plan and prioritize your marketing to maximize response.

6. Marketing Goals: Check the box in the heading of each tool to add them to your business plan and executive summary.

REAL ESTATE MARKETING

Total marketing budget this year: \$

Observations:

- a. Each marketing goal should be focused on what your desired outcome is. Select as many as you can implement and complete.
- b. Marketing ideas come from successful Coldwell Banker brokers across the country.
- c. Always be looking for ways to improve your marketing results and efficiencies.

Recommendations:

- a. Make yourself look more professional than your competition by building your business with the right tools.
- b. Start with tools that you can use right away and work on longer term tools by planning for them.
- c. Do not recreate the wheel.



Marketing Tools for Success

Things That Should Be Completed Today!

Update Business Photo

How long has it been since you have had a professional photo taken? 10 years...15 years? We recommend that you have a fresh professional photo that is less than 5 years old.

Email your new photo to CBFront@CBDanforth.com. We will make sure it gets uploaded to the CB National and our local CBD website. Once you are in possession of your updated photo, make sure you also update your Northwest MLS, Linked In and business Facebook photos as well.

At a **MINIMUM** your photo should be on the following sites:



realtor.com®



Add or Update Personal Profile(s)

Commit to making sure your personal profile page on ColdwellBanker.com is setup and current. Most consumers who go to real estate websites want one of two things...to look at homes or find a broker. If you don't have a complete profile on ColdwellBanker.com, you are missing one of the easiest ways to procure potential clients. Coldwell Banker moves those who have a complete profile to the top of the list. It is simple and free.

Click on this link [Personal Profiles](#) to find out how.

Implement Coldwell Banker Zap System



Zap®

Coldwell Banker® has ALWAYS been a leader. For 111 years we have lead the way with innovative real estate solutions. And now for a new chapter, we are thrilled to provide another innovation, a way for you to lead the real estate industry and create unrivaled opportunity in your local market.

What is Zap?

A single, integrated, end-to-end solution that includes a brokerage-branded website, mobile website and mobile app and integration with DASH and LeadRouter. Including high impact agent marketing and a world-class agent platform with predictive analytics so you know when to reach out to clients. Along with business management tools to help you drive your business. For more specific information on the platform please watch the overview video. [Zap Overview Video](#)

Use Home Warranty in your Marketing

Providing a home warranty sets you apart from the competition. This is a great value you provide to include in your CMA as well as your buyer side marketing. It makes for extremely happy and satisfied clients... you can be the hero when something goes wrong, rather than the scapegoat.

Plus, when you provide a home warranty, use only NWMLS forms, have a completed Form 17, and when the home is inspected it will probably qualify to reduce your E & O deductible from \$5000 to \$0.

Reminder: When you close through GPS Escrow, they will pay for a home warranty for your client.

Create or Update a quality branded CMA Package

Commit to putting together or having a professional CMA packet ready for use before you get a listing appointment. CBD has created customized CMA pages available in Word, PDF and PowerPoint. These pages are available on the CBD Intranet site under CMA Presentations.

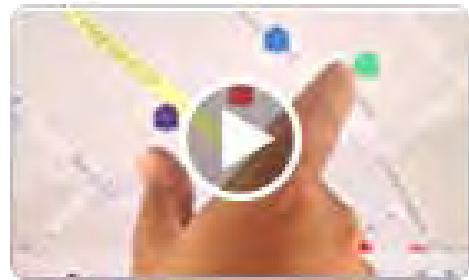
Coldwell Banker Danforth is also now paying for Cloud CMA for all brokers. It has all the CBD and CB National pages preloaded in addition to a full array of reports. To learn more about Cloud CMA, use the links below.



[**Generic Sample CMA**](#)



Top 5 reasons to use Cloud CMA



New Interactive iPad CMA

Getting the most from Cloud CMA's "What's My House Worth?"



(Click on the logo above for a quick video)

Cloud CMA makes it easy to generate leads via your agent website/blog or social media.

Cloud CMA has created a bunch of videos to help you get up and running with promoting your lead generating "What's My House Worth?" landing pages. Here are just few of the titles:

- * Generating leads from your email signature line.
- * Generating leads via Facebook, Twitter and Pinterest.
- * Add "What's My House Worth?" button to WordPress or website/blog.

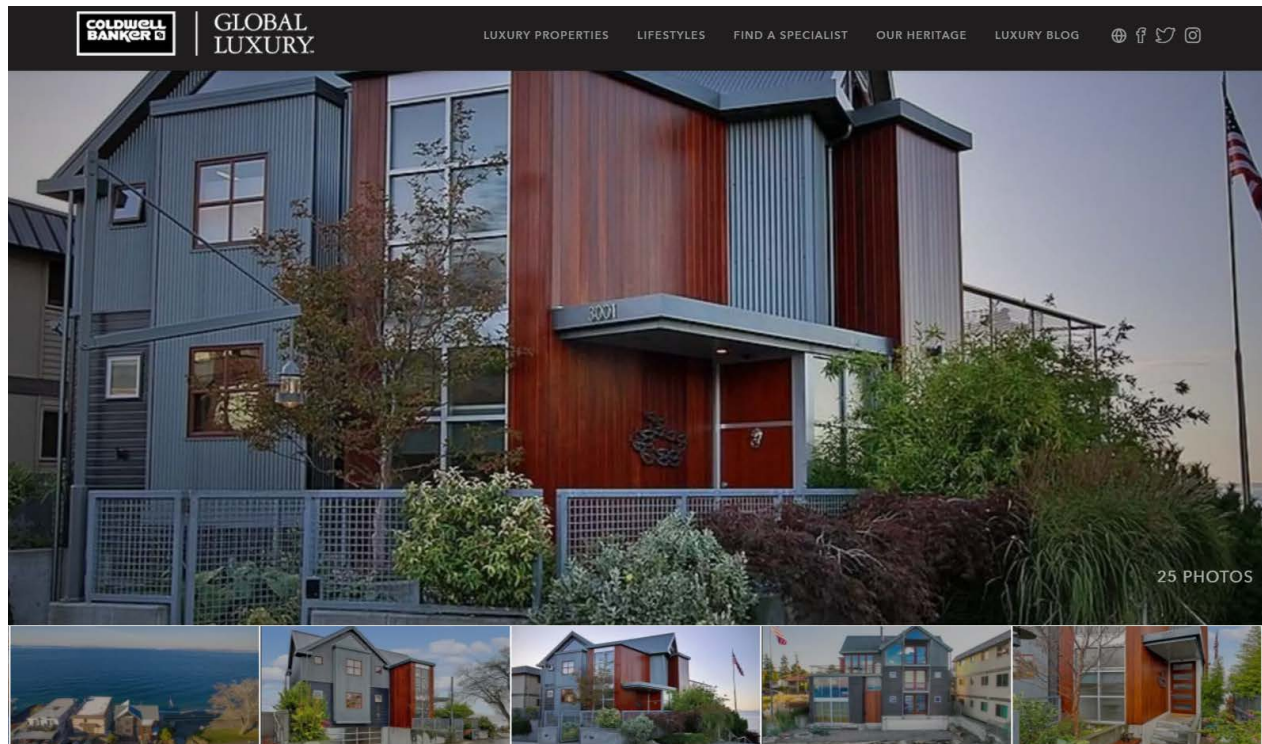
To see these features and new video tutorials just:

- 1) Log into your Cloud CMA account.
- 2) Click on the "Settings" link.
- 3) Click on the "Lead Gen" tab.

You will be on your way to generating new leads in no time!

Work towards getting CB Global Luxury Certified

Increase your average sales price and commission by selling more luxury homes. No franchise sells more luxury homes than Coldwell Banker. Take advantage of the CB Global Luxury Platform and Marketing Materials by becoming a Certified Coldwell Banker Global Luxury Property Specialist.



Become a Smart Homes expert

Exposure for Your Smart Home Listings Get “Smarter” About Selling Smart Homes

2017 saw the continued “smart home” movement at Coldwell Banker! They have embarked on a journey to again lead the real estate industry – this time through the emergence of the smart home movement – to give you the opportunity to be at the front of this trend with the information you need about listing, selling and living in smart homes. This is a trend that’s already making an impact with consumers. CB National found the following results in their smart home survey with CNET:

- * 1 in 4 Americans already own smart home devices
- * Nearly 50% of Millennials have already adopted the technology
- * 81% of smart home owners said they would be more likely to buy a smart home.



[A Smart Home for High Tech Living](#)

Start Texting Prospects

Commit to using new forms of prospecting this year. Start texting your prospects and clients!! Studies show that 90% of all people reply to a text in 5 minutes or less. How does that stack up with your emails??

Implement or Update Branded Email Signature

In the past, we suggested that every broker should have a personal video profile link in their email signature line. This is a great idea and super easy to do. Copy, paste and save the link to your signature line today.

As discussed in the CMA section, you should also add a link to your personalized "What is my house worth?" automated CMA page. Below is Bob's email signature from the Commercial Department as an example.



Use Trendgraphix Data for Marketing

Commit to using Trendgraphix as a resource for reports and trends. This can be used for personal knowledge, as additional resources for your listing CMA's and buyer's information. You can also post graphs and trends to your website for no additional fee using their Post2Web feature. They also have drip campaigns to keep you in front of your clients. The cost is \$10 per month. To get set up, contact Lori in CBD Bookkeeping at 206-212-2212 or Bookkeeping@CBDanforth.com.

Trendgraphix has drip campaigns and supplemental market data to help brokers communicate market trends with their buyers & sellers. [TRENDSend](#) and [Facts & Trends "Deluxe"](#) features an automatic marketing campaign system.

Handwritten Notes are a Powerful Tool

Handwritten notes are an inexpensive, easy to use form of communication. Keep them short, sincere and personal and they are sure to leave a lasting, positive impression.

- A personal note deepens a relationship with a client every time.
- They are always read.
- Just try not opening one or try just tossing one into the garbage without reading it.



Below are a few links to interesting articles about implementing them.



Work by Referral. *Live the Good Life!*[™]



Let Your Logo Start Conversations

Wear your Logo proudly

It will start conversations everywhere you go. You will be at a game, in line at the grocery store or at a party and people will notice the logo on your jacket and strike up a conversation. You can order a wide variety of branded items from [Land's End with just a few clicks!](#)

[Tax Deductible clothing?](#)



You can get your Logo on almost anything.

- Jackets
- Hats
- T-shirts
- Polo shirts
- Bags
- Coffee mugs
- Cars & Trucks



Wrap Your Car

You will get a lot of added exposure driving around town in a car wrapped in your brand. Don't want to drive "That" car? How about "Paying" your kid to drive your mobile billboard?

Create Personal and Listing Videos

The time has come that more and more sellers will demand or choose a listing broker who offers a video on their home for marketing purposes. We highly suggest you start the process now and win some listings because you are proactive. Don't wait until you start losing listings to other brokers who offer this service in a competitive listing opportunity.

The most effective long term solution for this is to shoot a onetime generic intro and conclusion to a listing video. Then all you have to do is shoot the house footage and sandwich it between the already produced personal listing video intro/exit.

Absolute Mortgage will produce your personal intro/exit videos in their Bellevue studio at NO CHARGE to CBD Brokers. Contact **Absolute Mortgage** for an appointment!

Start Using City/Neighborhood Videos

These types of videos are a great way to make yourself seem like the local expert. Imagine sending these off to an out of town buyer inquiring about a certain city. Or if you showed a prospective seller your personally branded video, showing that you are an expert in that area. You should incorporate the CBD City/Neighborhood Videos into your marketing. You can have these videos personally branded. The videos are priced at \$50.00 for one, \$75 for five or \$150 for all of them. It costs us thousands of dollars to produce these high caliber videos. Take advantage of this great resource!

The following videos have been produced and are ready for your use:

[Ballard](#)

[Bellevue East](#)

[Bellevue South](#)

[Bellevue West](#)

[Burien](#)

[Edmonds](#)

[Federal Way](#)

[Green Lake](#)

[Issaquah](#)

[Kirkland](#)

[Magnolia](#)

[Maple Valley](#)

[Redmond](#)

[Shoreline](#)

[Tacoma Downtown](#)

[West Seattle](#)

[Mercer Island](#)

[Seattle Downtown](#)

[Capitol Hill](#)

Coming Next! - Bothell | Puyallup | Queen Anne Hill | Sammamish

Below is a quick introduction video to Absolute Mortgage's Studio:



Check out Scott Morton's personally branded Kirkland video below:



Use CBD Transaction Light Services as Needed



The TLC program was put together specifically by request from CBD Brokers. This is an optional program that is designed to help brokers make the best use of their time. Feel free to use any of the programs on a case by case basis, no long term obligation or commitment.

1. Listing file setup and document upload: \$25 [TLC Listing Form](#)
2. PSA file setup and document upload: \$100 [TLC Sale Form](#)
3. Export your contacts from your computer (i.e., Outlook, G-Mail): \$25 for most brokers, (depending on the scope of work). Service Request Form [Service Request Form](#)
4. Import your contacts from any Excel or CSV file into Zap Contact Management System: \$25 [Service Request Form](#)

Identify and Hire a Transaction Coordinator

Are you spending too much time on routine tasks?

Commit to investigating the potential of hiring a transaction coordinator or assistant. If you find you are too busy doing the daily busy work and processing of transactions, your prospecting and other priorities are lacking their proper attention. You definitely need help.

Tom Ferry - BreakThrough By Design™ Course

BreakThrough By Design™ Teaches:

Goal Setting – You develop a simple, daily plan of follow through so you can help as many customers as you decide (and earn the amount of money you seek).

Organization – Relevant, progressive, consistent processes and systems are explained and lead generation programs are outlined. Agents will be taught methods for contacting past clients and their sphere of influence and learn to maintain a database that attracts listings.

Correct Mindset – Too many agents lack the belief or mindset that they can do more. BreakThrough By Design™ delves deep into this, creating an “I think I can” determination through the establishment of routines.

Goal Achievement – The best part about BreakThrough By Design™ is that through active, ten-week participation, you will achieve results! After ten weeks, we promise you will have done 3 transactions. You will have taken a listing, made a sale, and leased a property.

Email JackAngus@CBDanforth.com TODAY to get started.

Improve My Social Media Online Presence

Commit to learning the ins and outs of Social Media. Coldwell Banker has a put together tons of pertinent information on Social Media and how it relates to real estate. If you are unsure of where to start or just want to freshen your social status, click on the following to find out how to best run your campaign: [Becoming Social](#)

THERE ARE SIX MAJOR REASONS TO ADD SOCIAL MEDIA INTO YOUR MARKETING MIX.

- 1** It is completely free (Who doesn't love free?!)
- 2** It is relatively simple to use
- 3** It has become an accepted norm of business communications
- 4** It gives you better control of what potential clients searching for you online will find
- 5** It allows for constant **two-way** conversations
 - Unlike traditional print marketing, social marketing encourages dynamic conversations. Listening is a major part of the equation.
- 6** It is measurable (likes, comments, shares, retweets, repins, etc.)
 - This allows your strategy to be agile in real time.

Geographic Farming



Find an area where you would be effective in becoming the dominant broker.

Consider the number of homes you would like and can afford to market to.

It is recommended between 200 to 500 homes/contacts X 2 per month at a unit cost at approx. \$.80. Call a title rep to assist you in developing a geographic farm target list.

Size up your competition via research on the MLS and see if there is a dominant broker. If so, we can help you craft market advantages.

Xpress Docs on the Coldwell Banker Exchange website is a great marketing resource. Your profile will prepopulate key fields for your direct mail campaign. The CB branding designs are excellent.

Plan on doing open houses of your own or other brokers in your farm area starting in the first quarter of 2018 to become proficient at open house marketing. Market open houses with at least 10 signs. Tom Ferry recommendations 30. Wow!

The goal of this level of time and commitment is to position yourself as an area expert and earn the right to be heard. The go-to-broker who knows what is going on. The end game is personal conversations with interested prospects who are now aware of you. Qualify them and win a new piece of business.

Open Houses



The overall goals of an open house haven't changed much over the years, but the methods for making the property look its best and attracting potential clients are constantly evolving. This Field Guide offers resources to make open house events worthwhile, innovative, and safe for REALTORS®, home sellers, and potential buyers.

Field Guide to Open Houses



Click on the Logos below for additional resources.



Start Using CB National's eMarketing

Commit to learning and using the CB National eMarketing materials (Imprev) located in CB Works. Coldwell Banker has loaded many different email templates that are simple to use. You can easily import your contacts and set up future dates and times for keeping in front of your clients. Happy Birthdays, Holidays and tons of other materials are all available right now for your use. Simply login to [CBExchange](#) and click on the eMarketing tab.

CBD recently worked with Coldwell Banker national to bring you a series of webinars.

Cindy Spencley, the Director of Marketing for Coldwell Banker, led these webinars and recorded each of them for your viewing. If you missed any of them, or would like to review them, the links are below.

CBx

CBx is a great tool set you apart from our completion!

Learn how to use CBx and how to use CBx Data for Facebook Ads:

▶ [PLAY RECORDING](#)

Social Media

If you are looking for some ideas to ramp up your Social Media marketing:

▶ [WATCH](#)

eMarketing and Engaging Sellers

Learn About our FREE eMarketing Center and Why Engaging Sellers to Tell Their Story is Important:

▶ [LEARN HERE](#)

Reduce Your Fees by Referring Good Brokers

REFERRAL PROGRAM



NEW ONGOING REFERRAL COMPENSATION PLAN. 1 MONTH DESK FEE WAIVED!

The month that a broker you have referred to us pays their first desk fee, you get a free desk fee! Then, starting one year after that, you get a \$25.00 credit EVERY month the broker is with us.

ADDITIONAL INCENTIVE: If you ever reach the point you have referred 10 brokers who are working at CBD, we will waive your desk fee every month going forward.

Visit a Toastmasters Event



Is Toastmasters Right for You?

- Develop better speaking and presentation skills
- Learn to think quickly and clearly on your feet
- Build your leadership skills

Find a club:

<https://www.toastmasters.org/find-a-club>

More info:

<https://www.toastmasters.org/about> OR

<https://www.toastmasters.org/membership/a-toastmasters-journey>

Implement CRM (Customer Relationship Management)

Commit to having a fully functional and updated CRM system. If you do not currently have an adequate CRM, commit to use the Coldwell Banker Zap platform provided by CBD at no additional cost. It is set up specifically for CBD brokers.

What's the benefit?

- Increased sales through improved timing of communications by anticipating needs.
- Understanding consumers' requirements more effectively.
- Being able to identify what clients are profitable, and those who are not.
- Target marketing helps focus and optimize your advertising efforts.

What will this lead to?

- Improved client satisfaction and higher retention.
- A great reputation in the marketplace that will continue to expand.
- Your overall efficiency will improve, which will save you both time and money.

In the real estate world, the importance of retaining previous clients to expand business is vital. The more opportunities a client has to work with your company, the better.

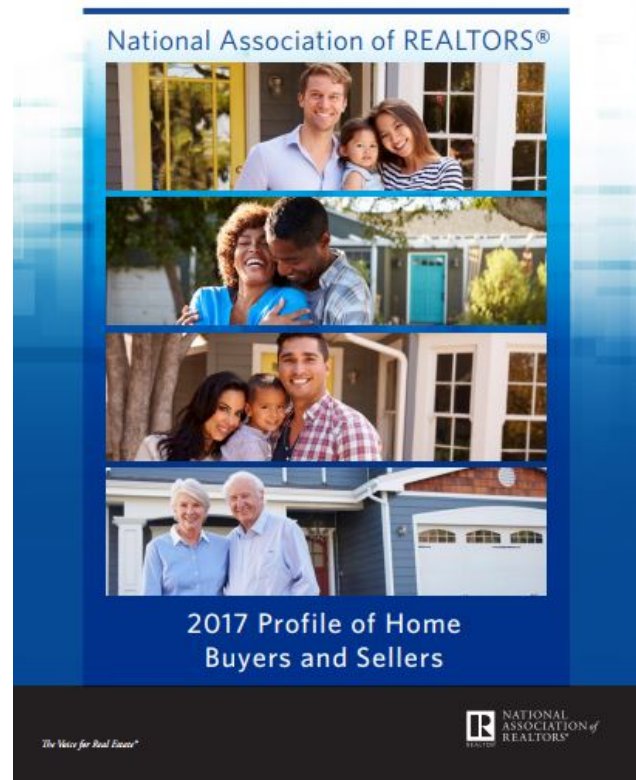


Read NAR's Profile of Home Buyers and Sellers

Every year the Board of Realtors issues a report that every CB Danforth broker should read regarding statistics and trends of today's buyers and sellers. The report is called:

"PROFILE OF HOME BUYERS AND SELLERS"

Take a few minutes and read this and make sure you use these important stats and information while putting your plan together.



PROFILE OF HOME BUYERS AND SELLERS

Housing Forecast

	2015	2016 Likely	2017 Foreca st	2018 Foreca st
New Home Sales	500,000	570,000	620,000	700,000
Existing Home Sales	5.3 million	5.4 million	5.5 million	5.7 million
Median Price Growth	+ 6.8%	+4.0%	4.2%	2.5%
30-year Rate	3.9%	3.6%	4.1%	4.5%

Develop and Implement a Personal Safety Protocol



CBD Protocol for New Client Meetings

We understand the need for balance between the reality of our business in today's market and how to put yourself in the best position not to be harmed.

- **Always meet new clients in a public place.**

Tell them to bring a picture ID. Here are some good locations: Our office, Client's office, Starbucks or restaurant.

- **Take a photo of the client's driver's license.**

If you get push back, tell them it is a CBD policy.

- **Send the photo to: Client.ID@CBDanforth.com**

Put client's cell phone number in the subject line. Let your client know it will be saved on our secure server.

If you cannot meet at a public place, do the previous steps in the driveway where you meet the client. Do not go into a house before getting their ID.

- **Move forward as normal with your meeting.**

This simple practice will eliminate most with ill intent. It is prudent to ask your new client to provide proof of their identity... You cannot test drive a car without doing this, and your safety is way more important than a car!

Develop and Implement a Personal Safety Protocol

With help from our strategic partners



Both Absolute Mortgage and GPS Escrow want to remind all CBD brokers that you are welcome at all of their locations. Absolute has 10 offices with conference rooms that you can call home, and GPS has a great location in Bellevue.

**Absolute Branches Available
for CBD Brokers:**

Bellevue Northup Branch

2800 Northup Way, Suite 220
Bellevue, WA 98004

Bellevue City Center Branch

500 108th Ave NE, Suite 1700
Bellevue, WA 98004

Auburn Branch

402 East Main Street, Suite 120
Auburn, WA 98002

Marysville Branch

9528 State Ave, Suite A
Marysville, WA 98270

Mill Creek Branch

15418 Main Street Suite 302
Mill Creek, WA 98012

North Puyallup Branch

2913 5th Ave NE Suite 101
Puyallup, WA 98372

GPS Escrow

400 112th Ave NE #335
Bellevue, WA 98004

Edmonds Branch

115 2nd Avenue North, Suite 200
Edmonds, WA 98020

Green Lake Branch

227 NE 65th Street, Unit 101
Seattle, WA 98115

Lynnwood Branch

19020 33rd Ave W, Suite 590
Lynnwood, WA 98036

7. Develop and Implement a Personal Safety Protocol to include:

- a.
- b.

Education and clock hours are critical milestones in professional development.

8. Educational Goals: I will work diligently to keep myself updated on the most current marketing, technical and sales related information possible each year.

- A. CB Blue View Classes
- B. Forms Class by Don Fillius
- C. Certified Results Agent™ Course
- D. Realtor Designations
 - GRI
 - CRS
 - ABR
 - SRS
- E. Coldwell Banker Global Luxury Course
- F. Coldwell Banker Smart Home Certification



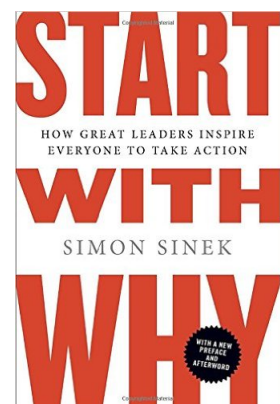
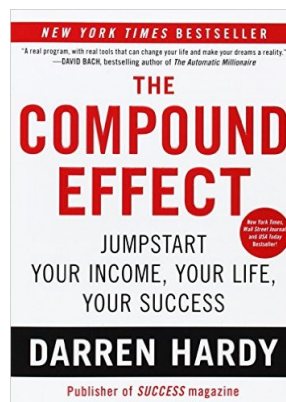
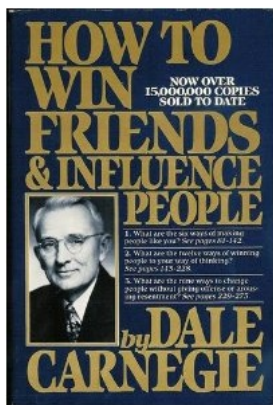
Observations:

- a. Those brokers who take time to sharpen their saw are generally more successful.
- b. Great new ideas come from education.
- c. It is critical to keep up-to-date on laws and industry changes.

Recommendations:

- a. Select designations in the areas of specialization for which you want to focus.
- b. Plan 30 or more hours of education each year.
- c. Attend all Coldwell Banker Danforth courses to keep up with local changes.
- d. Read at least 2 great business or personal development books a year.

CBD's Recommended must read list:



Commitments:

- a. I will schedule _____ class in _____ as my next educational goal.
- b. I will take an on-line course starting in _____.
- c. I will read the Realtor magazine and other materials to keep up-to date on my industry.

Hire a Good Coach



Coaching in real estate is a big deal. Some agents say the difference between their success and failure in this business is their relationship with their real estate coach — so it's imperative that you find someone you can trust to help you grow and reach your goals.

The International Coaching Federation defines coaching as:

“partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential”.

Learn the Strategies Our Members Use to Average \$395,185 Annually in Gross Commission Income



#1 COACH
FOR THREE CONSECUTIVE YEARS

POWER 200
Swanagepool

Inc. 500
AMERICA'S FASTEST-GROWING PRIVATE COMPANIES

THE 25 BEST Real Estate Coaches IN THE BUSINESS

The New York Times BESTSELLER

“Every agent has the potential for greatness and The Lones Group has been helping real estate professionals achieve greatness for over a decade. We can transform you.”

Denise



THE LONES GROUP
THE SECRET BEHIND YOUR SUCCESS

inman  



THE 25 BEST Real Estate Coaches
IN THE BUSINESS

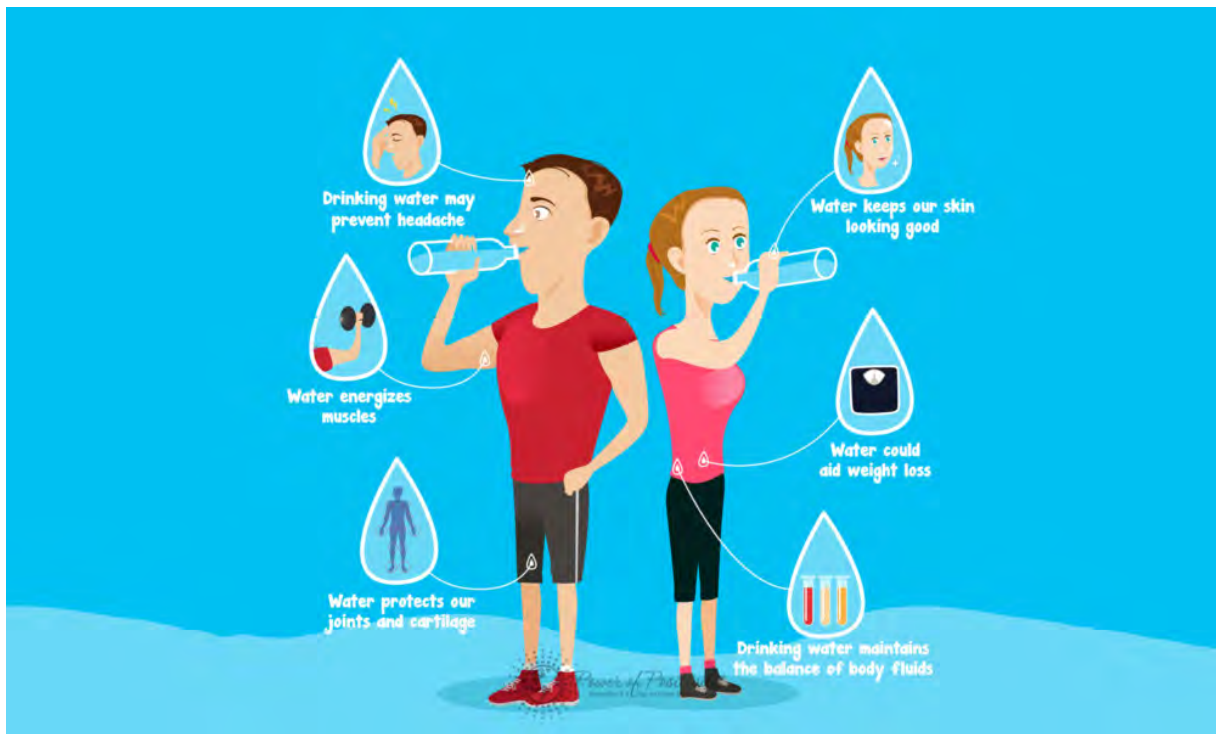
A healthy broker has the clarity and energy to set, pursue and achieve their goals.

9. Personal Health Goal:

- I will exercise at least three days each week.
- I will have a physical exam each year.
- I will develop more healthy eating habits.

Observations:

- a. Keeping well hydrated helps you think straight.
- b. Small, healthy snacks throughout the day keep the junk food cravings away.
- c. Exercise, even in moderation, increases energy level and alertness.



Recommendations:

- a. Planning balanced meals a week in advance makes preparation less stressful and mealtime more enjoyable.
- b. Plan fun activities such as hikes or walks with friends and family.
- c. Always have healthy snacks conveniently available in your home, office and car.

Commitments:

- a. I will exercise for ____ minutes ____ days per week.
- b. I will lose ____ Pounds by the first of ____.

Those closest to you are key to your success. Plan a great vacation to reward yourself and them for supporting your business plan.

10. Vacation Plan: As a reward for accomplishing all or most of my plan, I will take ____ days of vacation.

- Plan Location
- Plan Time
- Create Budget



Observations:

- Planning something exciting creates anticipation.

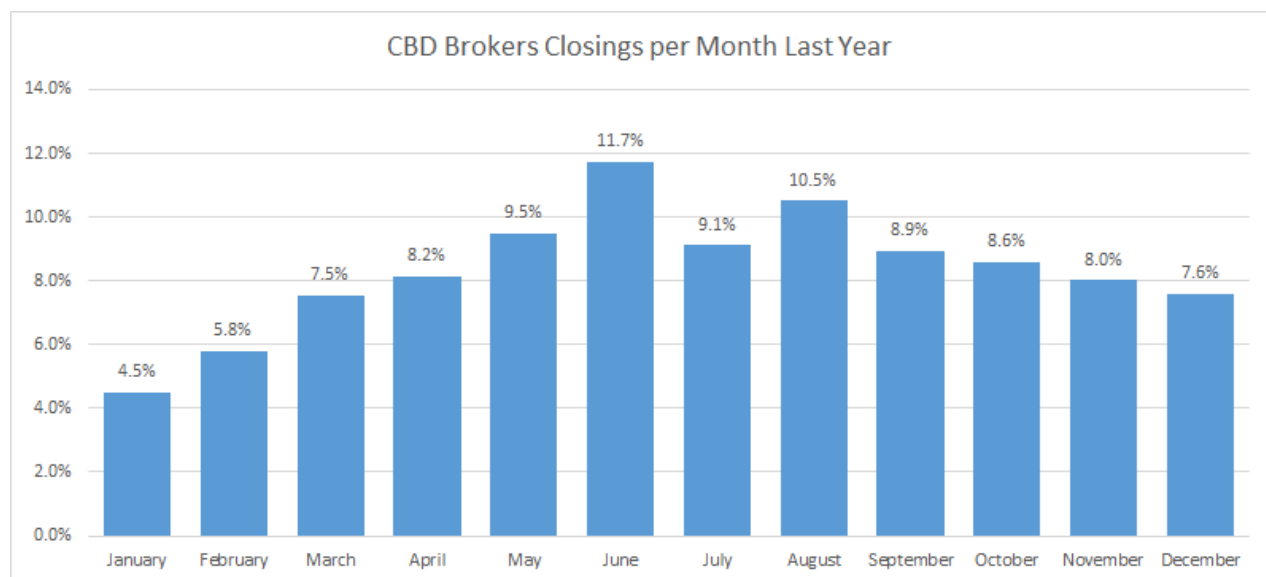
Recommendations:

- Plan your vacation during your least busy times of the year.
- Have a smaller, plan 'B' vacation in case your goals are not met.

Commitments:

- The destination of my next vacation will be
- I will take this major vacation for ____ days.
- My major vacation will be during the month of

Use the brokerage wide averages below for planning vacations, training and new projects.



Shared values and balance in your life are critical to your success.

11. Household and/or Significant Other Goals: I will review this plan and add additional goals based on the goals we define.

Household Goal 1: We will _____ by _____.

Household Goal 2: We will _____ by _____.

Observations:

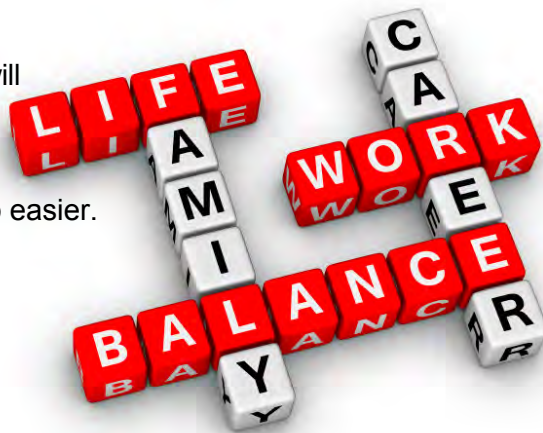
- When we all understand my goals, they will be more in tune with my actions.
- When they help create some of the goals, they will be invested in reaching them.
- A supportive environment will make my job easier.

Recommendations:

- Take time to update them on the status of your goals each month.
- Make sure they are nicely rewarded when you reach your major goals.
- Children need to feel included in goal making.

Commitments:

- I will include their goals in my plan.
- I will review my plan with them by: _____.
- I will update them on the status of my plan by: _____.



"We make a living by what we get, but we make a life by what we give." (Winston Churchill)

Are you part of the generosity generation?

12. Community Participation and Giving: I plan on participating in the following community activities:

A. Danforth in the Community

B. _____

C. _____

D. Church or Religious

E. Schools or Sport Organizations.

Observations:

- a. Brokers who give back to the community are generally happier and more successful.
- b. A good role model is someone who others want to do business with.
- c. Support organizations and causes for which you have a passion.

Recommendations:

- a. Try out different groups and join ones where you have a passion and fit well.
- b. Start on a committee and work towards the board.
- c. Count the conversations you have as part of your prospecting goal.

Commitments:

- a. I will try out my first organization by _____
- b. I will commit to the organization where I feel comfortable in the next quarter or no later than: _____
- c. I will show leadership in the organization and make a point to get to know the other participants.

Volunteering Counts!

The most important hour of your week may be the one you give away.



Each person is wired a little differently. What motivates you?
What else do you need to be successful?

13. Additional Goals: What else will you implement this year to improve yourself or streamline your business?

A. Improving your current technology.

(Have you looked at implementing Microsoft Office 365?)

B. Commit to reading at least one inspirational book per quarter.

C. I plan on _____ to be completed by _____.
Step 1 _____
Step 2 _____

D. I plan on _____ to be completed by _____.
Step 1 _____
Step 2 _____

E. I plan on _____ to be completed by _____.
Step 1 _____
Step 2 _____



Executive Summary

1. Work Commitment: I plan on working ____ hours per day, ____ days per week.

My average day will start at

2. Income Goal: This year I will close a total of ____ transaction sides, ____ (____) will be from my listing inventory to generate my overall goal of at least \$____.

Per your income goal, your time is worth \$____ per hour.

3. Budget Plan: NAR recommends spending no more than \$____ (33%) of your \$____ income on business expenses and no more than \$____ (33% of expenses) on marketing.

\$____ Marketing (NAR recommends less than \$____ 33% of your expenses)

\$____ Supplies

\$____ Memberships/Dues

\$____ Automobile

\$____ Insurance

\$____ Equipment & Technology

\$____ Telephone

\$____ Education / Clock Hours & Certifications

\$____ Retirement

\$____

\$____

\$____

\$____ **Total** (NAR recommends less than \$____ ~ 33% of your income)

\$____ **Net Income** before income taxes

4. Prospecting Goal: Most, if not all, of your success depends on prospecting

You rated each Idea below: "Doing **Now**", "Planning **To Do**" or "**Never Do**"

____ REO	____ Foreclosure	____ Client Newsletter
____ FSBO's	____ Open Houses	____ Friends and Family
____ Website	____ Vacant Land	____ Out of State Owners
____ Engaged	____ Social Media	____ Up Size / Down Size
____ Married	____ Telemarketing	____ Prospect Newsletter
____ Drafted	____ Door Knocking	____ Farming - Geographic
____ Promoted	____ Service Groups	____ Farming - Price Range
____ 2nd Homes	____ Expired Listings	____ Farming - Specialty Property
____ Short Sale	____ Tenant / Renters	____ 1st time Buyer Seminars
____ Relocation	____ Orphaned Clients	____ Tenant Occupied Listings
____ Direct Mail	____ New Construction	

I will keep track of my top _____ prospects and make sure to communicate with them several times per week.

5. Communication with contacts

My daily contact target is _____ meaningful conversations.

I will have _____ contacts in my CRM.

I will upgrade my CRM by _____.

I will **touch** each contact no less than four times each year.

6. Marketing Goals: Incorporate the following tools into my business this year:

.

Your additional Marketing Goals not listed above:

7. Develop and Implement a Personal Safety Protocol to include:

a.

b.

8. Educational Goals: I will work diligently to keep myself updated on the most current marketing, technical and sales related information possible each year.

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Step 1 _____

Step 2 _____

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Step 1 _____

Step 2 _____

I plan on _____ to be completed by _____.

Step 1 _____

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