

Sample: Team Single-Page Business Plan

Annual Goal

\$50 Million Annual Sales Volume

3 Key Focus Areas

1. **Customer Service:** Create the Ultimate Client Experience
2. **Lead Generation:** Track Agent Generation & Conversion Activity
3. **Hire & Recruit:** Attract New Talent to the Team

5 Objectives for each Focus Area

1. Customer Service

2. Lead Generation

3. Hire & Recruit

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1. Admin Assistant to conduct 30, 90 & 120 day follow-up calls to clients after all closings to suggest vendors for improvements & ask for referrals.	1. Conduct Group Lead Generation every Mon - Fri for 2 hours (9:00am – 11:00am) for all sales agents. Agents meet at 8:30am for role play & scripts practice beforehand.	1. Begin search for an Administrative Lead Coordinator. Interview 4 applicants per month until found. Create job description & establish behavioral profile.
2. Produce Pre-Listing video introducing the team, marketing plan & services we provide to send to client prior to initial listing appointment.	2. Sales Agents to track Lead Generation Activities (Contact-Appointment-Contract) & submit at end of each week for accountability & to establish conversion ratios.	2. Hire an Inside Sales Agent (ISA) – Determine compensation schedule, job duties & description, and behavioral profile. Locate ISA training resources or coach.
3. Increase Online Presence: 4 Team Websites for 1) Sellers; 2) Buyers; 3) Neighborhood Farms; and 4) Blog.	3. Determine criteria & system to: 1) Distribute inbound leads/calls; and 2) Make outbound contacts to COI, FSBO, Expireds, Just Listed/Solds & Farms.	3. Establish criteria/goals for Buyers Agents to earn Showing Assistants. Establish respective job descriptions & compensations schedules.
4. Enhance/Update Client Database Contacts: 1) 33 Touches per year; and 2) Client Appreciation Event.	4. Develop Action Plans & Campaigns to Farm 4 neighborhoods.	4. Develop printed & video presentations to recruit new sales agents.
5. Grow Vendor Database: 1) Contact regularly; 2) Vendor Appreciation party; 3) Create Vendor List & Web Page; & 4) Refer them systematically.	5. Obtain 10 new listings, 9 buyer contracts, and 15 closed transactions per month.	5. Locate two new sales agents in adjacent geographic locations to expand & service new areas.