

20

G.O.A.L.S.

22

planner



ACCOUNTABILITY PLANNER & COMMUNITY FOR THE WORKING-BY-REFERRAL REAL ESTATE AGENT

GROWING

VISUALIZE THE LIFE YOU WANT, ESTABLISH THE STEPS, EXECUTE THE PLAN,
TRACK THE PROGRESS, AND NEVER STOP DREAMING BIGGER.

ORGANIZATION

CLEAR YOUR DESK, CLEAR YOUR MIND.
KNOWING WHAT TO DO, WHERE TO GO, AND
HOW IT WILL GET DONE IS HALF THE BATTLE!

ACTION

FOCUS ON INTENTIONAL PRODUCTIVITY.
THE SELLING & BUYING PROCESS & SERVICE IS YOUR JOB.
LEAD GENERATING ACTION TO BUILD YOUR PIPELINE IS YOUR BUSINESS...
KNOW HOW YOU WANT TO BUILD IT & BE CONSISTENT.
ACTIVELY BREEDS ACTIVITY!

LEARN

BE IN A CONSTANT STATE OF LEARNING ABOUT YOURSELF,
YOUR BUSINESS, AND YOUR RELATIONSHIPS.

SYSTEMS

A WELL-OILED MACHINE IS BUILT ON A STRONG FOUNDATION
OF SYSTEMS AND TRACKING. KNOW WHAT YOU'VE DONE AND HOW SO YOU
KNOW WHAT YOU NEED TO DO TO ACHIEVE YOUR GOALS.

NEW YEAR, SAME PASSION PROJECT, 3RD VERSION OF THE G.O.A.L.S. PLANNER.

OUR COMMUNITY HAS SHOWN ME THAT KNOWING WHAT NEEDS TO BE DONE IS
NOT THE HARD PART WHEN YOU WANT IT BAD ENOUGH & YOUR VISION IS CLEAR.

THE HARD PART IS THE DAILY DRIFT, DISTRACTIONS, HABITS, & EMOTIONS.

**WHAT MAKES IT EASIER IS A LIKE-MINDED GROUP OF FRIENDS THAT
SHOW UP NO MATTER WHAT TO KEEP YOU ON TRACK.**

WE KNOW WHAT MATTERS TO US AND EACH WEEK
WE REMIND EACH OTHER,
ENCOURAGE EACH OTHER,
AND SUPPORT EACH OTHER.

THANK YOU FOR SHOWING UP FOR YOURSELF, THE GROUP, AND ME.

Gina Carter

2022 at a glance

JANUARY

S	M	T	W	T	F	S
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FEBRUARY

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MARCH

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a plan to stay
TOP OF MIND

POP-BYS + MAIL-BYS
REVERSE POP-BY EVENT
REASONS TO REACH OUT
CLIENT/COMMUNITY EVENT
SOCIAL MEDIA ENGAGEMENT

January

February

PREP YOUR SPRING POP-BYS

March

April

May

PREP YOUR SUMMER POP-BYS

June

July

August

PREP YOUR FALL POP-BYS

September

October

November

PREP YOUR HOLIDAY POP-BYS

December

2022 Q1

JANUARY

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GOALS THIS QUARTER I WILL ACCOMPLISH

Business:

Finances:

Family:

Self:

10 DAY GOALS

DREAM BIG 2022 GOALS

Q1 RECAP

JANUARY

Most Proud:

FEBRUARY

Most Proud:

MARCH

Most Proud:

KEEP:

IMPROVE:

START:

STOP:

YTD CHECK-IN

ANNUAL INCOME GOAL

YTD: _____

2022 GROSS GOAL: _____

ANNUAL SALES GOAL

YTD: _____

2022 GOAL: _____

TRANSACTION GOAL

YTD: _____

2022 GOAL: _____

REFERRAL GOAL

YTD: _____

2022 GOAL: _____

LIST/BUY APPT GOAL

YTD: _____

2022 GOAL: _____

TOTAL CONTACTS

YTD: _____

2022 GOAL: _____

**THIS IS THE BUSINESS PLAN I
DESIGNED TO ACCOMPLISH
MY GOALS IN 2022**

a plan to stay TOP OF MIND

POP-BYS + MAIL-BYS
REASONS TO REACH OUT
CLIENT/COMMUNITY EVENT
SOCIAL MEDIA ENGAGEMENT



MONTHLY MARKETING

- Newsletter Mailer:
- E-Mail:
- Open House:
- Open House:
- Networking:
- Event:

MONTHLY ACTION PLAN

TRANSACTION GOAL:

ACTUAL:

REFERRAL GOAL:

ACTUAL:

LIST/BUY APPT GOAL:

ACTUAL:

"CONTACTS" GOAL:

ACTUAL:

ADD UP TOTAL
"CONTACTS" BELOW

CONVERSATIONS:

NOTES:

POP-BYS:

FACE-TO-FACE APPTS:

NEW MET ADDED TO
DATABASE:

SPHERE ENGAGEMENT

Share

- professionally*
- share testimonial received
 - share/highlight small business or vendor
 - share new listings/listing needs
 - share active buyer needs
 - share a real estate buyer tip or struggle & solution
 - share a real estate seller tip or struggle & solution
 - share a step in the real estate process
 - share your market update
 - share your referral goal
 - share your buying/listing appointment goal
 - share a business win
 - share business behind the scenes
 - share your business story (how, why, who)

- personally*
- share a book or podcast
 - share a recommendation (product/vendor/place/busin)
 - share a personal goal
 - share a personal win
 - share a personal behind the scenes
 - share a holiday

Give

- reward a review given
- reward referral given
- give a review
- giveaway raffle/contest

Video

- birthdays
- market update
- client transaction update
- virtual home tour
- top referral/A+ client check-in

Call to Action

- ask for client reviews
- ask for a referral (get specific on what that looks like)
- ask for a recommendation (product/vendor/place/busin)

01 | 2022

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1 New Year's Day

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CALLS

intentional conversations

MONTH: **JANUARY**

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CONNECT.NURTURE.BUILD.

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MONTH:

JANUARY

POP-BYS

unexpected item of value

Item: _____

Purchased:

Prepped:

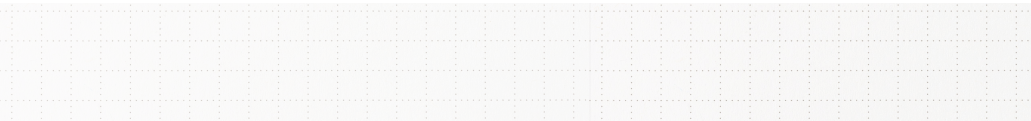
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NOTES *thoughtful touches*

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WORK-BY-REFERRAL

Referrals Given This Month

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Referrals Received This Month

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Add to Database This Month

1. _____
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APPOINTMENTS

Face-to-Face for Fun

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Listing & Buying Appointments

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Closing Days!

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FEBRUARY



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27	28					

TOP 5 GOALS:

FOCUS (YOUR "ONE THING"):

INSPIRATION:

EVENTS/BIRTHDAYS:

- 13th Super Bowl
- 4-20 Winter Olympics
- 14th Valentine's Day
- 21st Presidents' Day

DAILY HABITS TO TRACK:

_____	1	2	3	4	5	6	7	8	9	10	15	20	25	30
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_____	1	2	3	4	5	6	7	8	9	10	15	20	25	30
_____	○	○	○	○	○	○	○	○	○	○	○	○	○	○



a plan to stay TOP OF MIND

POP-BYS + MAIL-BYS
REASONS TO REACH OUT
CLIENT / COMMUNITY EVENT
SOCIAL MEDIA ENGAGEMENT



MONTHLY MARKETING

- Newsletter Mailer:
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ACTUAL:

REFERRAL GOAL:

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- birthdays
- market update
- client transaction update
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- top referral / A+ client check-in

Call to Action

- ask for client reviews
- ask for a referral (get specific on what that looks like)
- ask for a recommendation (product/vendor/place/busin)

February

SUN

MON

TUE

S M T W T F S
1 2 3 4 5
6 7 8 9 10 11 12
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TO-DO LIST

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14 Valentine's Day

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21 Presidents' Day

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NOTES

A grid of small squares formed by dotted lines on a light gray background. The grid consists of 10 columns and 15 rows of squares. The grid is located in the bottom third of the page.

CALLS

intentional conversations

MONTH: **FEBRUARY**

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CONNECT.NURTURE.BUILD.

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POP-BYS

unexpected item of value

Item: _____

Purchased:

Prepped:

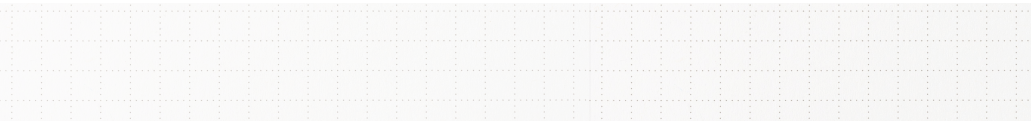
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NOTES *thoughtful touches*

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WORK-BY-REFERRAL

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Listing & Buying Appointments

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Closing Days!

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a plan to stay TOP OF MIND

POP-BYS + MAIL-BYS
REASONS TO REACH OUT
CLIENT/COMMUNITY EVENT
SOCIAL MEDIA ENGAGEMENT



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"CONTACTS" GOAL:

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ADD UP TOTAL
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- top referral/A+ client check-in

Call to Action

- ask for client reviews
- ask for a referral (get specific on what that looks like)
- ask for a recommendation (product/vendor/place/busin

TO DO

MONTH:

MARCH

March

OVERVIEW

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TO-DO LIST

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WED	THU	FRI	SAT
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16	17 St. Patrick's Day	18	19
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NOTES

A grid of dotted lines for writing notes, consisting of 10 columns and 15 rows.

CALLS

intentional conversations

MONTH:

MARCH

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unexpected item of value

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Prepped:

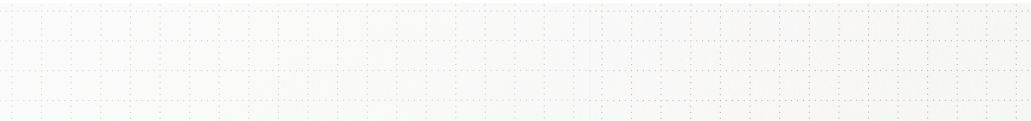
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NOTES *thoughtful touches*

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29. _____
30. _____
31. _____
32. _____
33. _____
34. _____
35. _____
36. _____
37. _____
38. _____
39. _____
40. _____



WORK-BY-REFERRAL

Referrals Given This Month

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Referrals Received This Month

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Add to Database This Month

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

APPOINTMENTS

Face-to-Face for Fun

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
- _____
- _____

Listing & Buying Appointments

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
- _____
- _____

Closing Days!

1. _____
2. _____
3. _____
- _____
- _____