

BUFFINI & COMPANY

# Team COACHING™



# Business Plan 2022



# A co-created plan that moves me significantly in the direction of my goals.

## With the Business Coaching Plan I Will:

- Take inventory of my accomplishments and progress.
- Create a solid business and marketing plan for the next year.
- Identify and create movement in all 5 circles.  
(Business, Financial, Personal, Family, Spiritual)
- Have a clear roadmap allowing me to create and design my business.
- Allow and encourage my Team Coach to stand in the gap between where I am currently, and the achievement of this plan.

I \_\_\_\_\_, on \_\_\_\_/\_\_\_\_/\_\_\_\_

created the following plan with my Coach \_\_\_\_\_.

**Directions:** Please download this editable .PDF, save it on your computer, then complete it to the best of your ability. When complete, re-save and close the .PDF and load it into Referral Maker® CRM under “Drive”. Then, you and your Coach can both reference the same document.

# Mission Statement

## Mission Statement:

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## Core Values:

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## My Why:

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# Accomplishments | 2021

## Business:

### My Business:

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### Team Business:

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## Financial:

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## Personal:

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## Family:

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## Spiritual:

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# Business Goals

## My Business Goals:

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

### Team Business Goals:

[illegible]

# MY BUSINESS GOALS

Target Annual Net Income Goal

My Tax Rate (e.g., 33% tax rate enter as 0.33)

Estimated Team Income Before Taxes  
(Use # from line 1 on Page 7, Team Business Goals)

Estimated Personal Income Before Taxes

Annual Personal Business Expenses

Adjusted Gross Commissions

Average Commission Rate (per side)

Previous Year Average Sales Price

Total Transactions

Monthly Transaction Goal

Quarterly Transaction Goal

Personal Days Off

| Year to Date 2021 | Goal for 2022 |
|-------------------|---------------|
|                   |               |
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## Proactive Lead-Generation Activity:

### My Referral and Contact\* Ratios:

My # Referrals for 1 Close

My # Contacts for 1 Referral

Referrals per Month

Contacts per Month

Daily Contacts

| Year to Date 2021 | Goal for 2022 |
|-------------------|---------------|
|                   |               |
|                   |               |
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|                   |               |

Use the above information to fill out My Business Dashboard in Referral Maker CRM.

If you do not know your referral and contact ratios use the recommended ratios below:

#### Recommended Referral and Contact\* Ratios:

- 3 Referrals to 1 Close (Transaction target x 3 = Referrals Needed)
- 20 Contacts to 1 Referral (Referrals Needed x 20 = Total Contacts Needed)
- Contacts needed ÷ 20 = Daily Contacts Needed (based on 20 workdays per month)

**\*Note:** "Contact" = an actual interaction with a person via face-to-face (Pop-By, etc.) or voice-to-voice (phone conversation) and asking for a referral.

# TEAM

## BUSINESS GOALS

Estimated Team Income Before Taxes

Annual Team Business Expenses

Adjusted Team Gross Commissions

Average Commission Rate (per side)

Previous Year Average Sales Price

Total Team Transactions

Monthly Team Transaction Goal

Quarterly Team Transaction Goal

Total Team Days Off

| Year to Date 2021 | Goal for 2022 |
|-------------------|---------------|
|                   |               |
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### Proactive Lead-Generation Activity:

#### Team Referral and Contact\* Ratios:

Team Average Referrals for 1 Close

Team Average Contacts for 1 Referral

Total Team Referrals per Month

Total Team Contacts per Month

Total Team Daily Contacts

| Year to Date 2021 | Goal for 2022 |
|-------------------|---------------|
|                   |               |
|                   |               |
|                   |               |
|                   |               |
|                   |               |



# MY MARKETING PLAN

# 2022

|             |                         | JANUARY | FEBRUARY | MARCH |
|-------------|-------------------------|---------|----------|-------|
| 1st Quarter | Reason to Call          |         |          |       |
|             | Reason to Text          |         |          |       |
|             | Pop-By Gift Idea        |         |          |       |
|             | Video Email Message     |         |          |       |
|             | Client Party Date/Theme |         |          |       |
|             | Business Mixer Date     |         |          |       |
|             | B2B Endorsement (IOV)   |         |          |       |
|             | Additional Marketing    |         |          |       |
|             | Events/Training         |         |          |       |
|             | # Days Off/Vacation     |         |          |       |

|             |                         | APRIL | MAY | JUNE |
|-------------|-------------------------|-------|-----|------|
| 2nd Quarter | Reason to Call          |       |     |      |
|             | Reason to Text          |       |     |      |
|             | Pop-By Gift Idea        |       |     |      |
|             | Video Email Message     |       |     |      |
|             | Client Party Date/Theme |       |     |      |
|             | Business Mixer Date     |       |     |      |
|             | B2B Endorsement (IOV)   |       |     |      |
|             | Additional Marketing    |       |     |      |
|             | Events/Training         |       |     |      |
|             | # Days Off/Vacation     |       |     |      |

Be sure to plug these activities into your calendar: **1)** Attend One Buffini & Company Event **2)** Host 1 Business Mixer at least once a Quarter **3)** Host Client Appreciation Party at least 2x /Year

# MY MARKETING PLAN

# 2022

|             |                         | JULY | AUGUST | SEPTEMBER |
|-------------|-------------------------|------|--------|-----------|
| 3rd Quarter | Reason to Call          |      |        |           |
|             | Reason to Text          |      |        |           |
|             | Pop-By Gift Idea        |      |        |           |
|             | Video Email Message     |      |        |           |
|             | Client Party Date/Theme |      |        |           |
|             | Business Mixer Date     |      |        |           |
|             | B2B Endorsement (IOV)   |      |        |           |
|             | Additional Marketing    |      |        |           |
|             | Events/Training         |      |        |           |
|             | # Days Off/Vacation     |      |        |           |

|             |                         | OCTOBER | NOVEMBER | DECEMBER |
|-------------|-------------------------|---------|----------|----------|
| 4th Quarter | Reason to Call          |         |          |          |
|             | Reason to Text          |         |          |          |
|             | Pop-By Gift Idea        |         |          |          |
|             | Video Email Message     |         |          |          |
|             | Client Party Date/Theme |         |          |          |
|             | Business Mixer Date     |         |          |          |
|             | B2B Endorsement (IOV)   |         |          |          |
|             | Additional Marketing    |         |          |          |
|             | Events/Training         |         |          |          |
|             | # Days Off/Vacation     |         |          |          |

Be sure to plug these activities into your calendar: **1)** Attend One Buffini & Company Event **2)** Host 1 Business Mixer at least once a Quarter **3)** Host Client Appreciation Party at least 2x /Year

# TEAM MARKETING PLAN

# 2022

|             |                          | JANUARY | FEBRUARY | MARCH |
|-------------|--------------------------|---------|----------|-------|
| 1st Quarter | Reason to Call Your Team |         |          |       |
|             | Pop-By to Your Team      |         |          |       |
|             | Team Notecard Campaign   |         |          |       |
|             | Team Client Party        |         |          |       |
|             | Team B2B Initiative      |         |          |       |
|             | Monthly Meeting Agenda   |         |          |       |
|             | Training                 |         |          |       |
|             |                          |         |          |       |
|             |                          |         |          |       |
|             |                          |         |          |       |

|             |                          | APRIL | MAY | JUNE |
|-------------|--------------------------|-------|-----|------|
| 2nd Quarter | Reason to Call Your Team |       |     |      |
|             | Pop-By to Your Team      |       |     |      |
|             | Team Notecard Campaign   |       |     |      |
|             | Team Client Party        |       |     |      |
|             | Team B2B Initiative      |       |     |      |
|             | Monthly Meeting Agenda   |       |     |      |
|             | Training                 |       |     |      |
|             |                          |       |     |      |
|             |                          |       |     |      |
|             |                          |       |     |      |

Be sure to plug these activities into your calendar: **1)** Attend One Buffini & Company Event **2)** Host 1 Business Mixer at least once a Quarter **3)** Host Client Appreciation Party at least 2x /Year

# TEAM MARKETING PLAN

# 2022

|             |                          | JULY | AUGUST | SEPTEMBER |
|-------------|--------------------------|------|--------|-----------|
| 3rd Quarter | Reason to Call Your Team |      |        |           |
|             | Pop-By to Your Team      |      |        |           |
|             | Team Notecard Campaign   |      |        |           |
|             | Team Client Party        |      |        |           |
|             | Team B2B Initiative      |      |        |           |
|             | Monthly Meeting Agenda   |      |        |           |
|             | Training                 |      |        |           |
|             |                          |      |        |           |
|             |                          |      |        |           |
|             |                          |      |        |           |

|             |                          | OCTOBER | NOVEMBER | DECEMBER |
|-------------|--------------------------|---------|----------|----------|
| 4th Quarter | Reason to Call Your Team |         |          |          |
|             | Pop-By to Your Team      |         |          |          |
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|             | Team Client Party        |         |          |          |
|             | Team B2B Initiative      |         |          |          |
|             | Monthly Meeting Agenda   |         |          |          |
|             | Training                 |         |          |          |
|             |                          |         |          |          |
|             |                          |         |          |          |
|             |                          |         |          |          |

Be sure to plug these activities into your calendar: **1)** Attend One Buffini & Company Event **2)** Host 1 Business Mixer at least once a Quarter **3)** Host Client Appreciation Party at least 2x /Year

# Annual Team Assessment

## MARKETING

Rate your current marketing on a scale from 1-10, with 10 being the highest.

What is the main reason you gave that score?

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What is your Unique Selling Proposition?

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How does your team align with that message?

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What marketing efforts provide you with your highest volume and best quality of leads?

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What is the ONE thing you believe you need to implement or improve on in your marketing?

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# Annual Team Assessment

## SALES

Rate your current sales on a scale from 1-10, with 10 being the highest.

What is the main reason you gave that score?

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What is the ONE thing you believe you need to implement or improve on for your sales?

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# Annual Team Assessment

## CUSTOMER SERVICE

Rate your current customer service on a scale from 1-10, with 10 being the highest.

What is the main reason you gave that score?

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What is your biggest customer service challenge?

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What is your biggest customer service strength?

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What is the ONE thing you believe you need to implement or improve in your customer service?

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# Annual Team Assessment

## SYSTEMS AND OPERATIONS

Rate your current systems and operations on a scale from 1-10, with 10 being the highest.

What is the main reason you gave that score?

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Could your current operations support 15-25% sales growth?

☐ YES ☐ NO

What is the **ONE** thing you believe you need to implement or improve on in your systems and operations?

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# Annual Team Assessment

## FINANCES

Rate your current cash flow management system on a scale from 1-10, with 10 being the highest.

What is the main reason you gave that score?

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How many months of expenses do you have in cash reserves?

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## RECRUITING AND HIRING

Rate your current process for recruiting & hiring from 1-10, with 10 being the highest.

What is the main reason you gave that score?

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Have you written a job description for yourself?

☐ YES ☐ NO

Have you created an ideal agent job description?

☐ YES ☐ NO

Have you written job descriptions for your team and clearly defined roles for all positions?

☐ YES ☐ NO

# Annual Team Assessment

## LEADERSHIP

Rate your current leadership skills on a scale from 1-10, with 10 being the highest.

What is the main reason you gave that score?

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How would your team describe your leadership style?

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What leadership activities will you work on next year?

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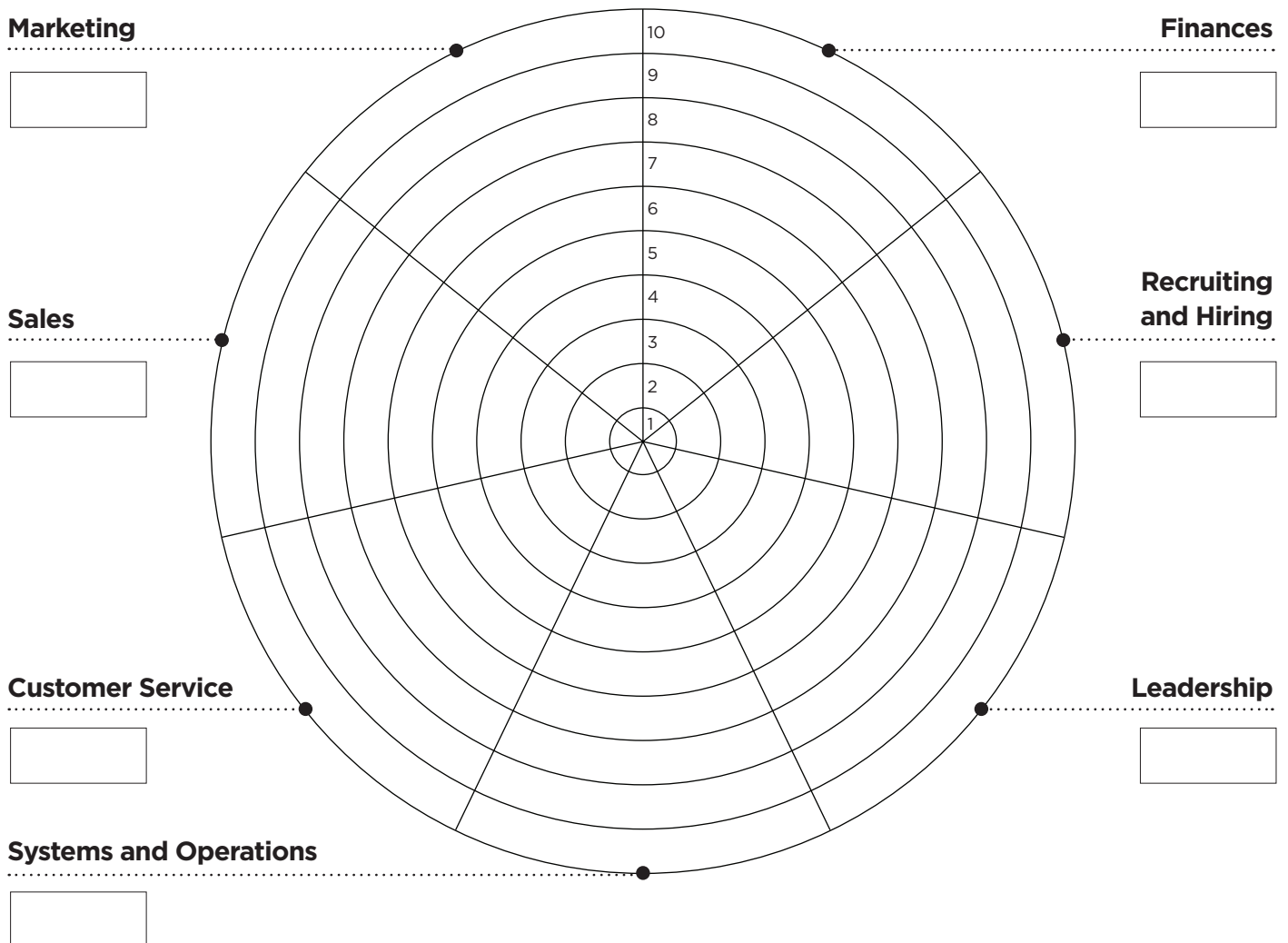
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# Business Scale

The seven sections in the Business Scale are a visual way of representing the balance of various areas of your business.

**Directions:** Print out this page and plot your scores, 1 to 10, on your Business Scale for each area from the Team Assessment – Marketing, Sales, Customer Service, Systems & Operations, Finances, Recruiting & Hiring and Leadership. Draw a line in each section out to the number for your rating. The new perimeter of the circle represents your current business balance.



This scale gives you an indication of how smoothly your business is operating. Based on this, what area of focus would make the biggest impact on your team in the next 90 days?

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# Financial Assessment

|                      | Business |             | Personal |             |
|----------------------|----------|-------------|----------|-------------|
| Total Monthly Budget |          |             |          |             |
|                      | \$       | # of Months | \$       | # of Months |
| Total Cash Reserves  |          |             |          |             |
| Additional Assets    |          |             |          |             |
| Liabilities          |          |             |          |             |
| Net Worth            |          |             |          |             |
| Retirement           |          |             |          |             |

Where will I track my expenses/budget?

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How often will I commit to review?

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# Five Circle Goals

## Financial:

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## Personal:

### Physical:

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### Mental:

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## Family:

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## Spiritual:

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