

Business Planning

WITH ROLAND KYM



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Business Planning Workbook

Welcome to Business Planning 101! This workbook is intended to help you navigate towards success, designed to help with goal setting and establish a routine that will help you get there.

When you dedicate the time to work on your business goals and commit to a structured approach, you create the opportunity to conquer huge achievements and overcome challenges that come your way.

Use this time to set ambitious goals for yourself. Set ambitious goals, improve your lead-generating system, delegate tasks systematically, refine your marketing approach and never stop growing your business.

Join me on this business planning adventure and use this workbook to create the most successful version of your business!



“

**Dedicate time to
work on your
business for long
term success**

-Roland Kym

”



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Step 1: Time Block

Dedicate 1 hour per week to work on your business goals, dedicate the time it takes to make it happen!

Use this workbook as a roadmap to designing your business and focus on your BIG WHY. The following section will help you design your time blocking commitment:

DAY OF THE WEEK

TIME SLOT

Choose a day and time that works for you. Consistency is key, choose a time you can commit to every week. Example: Every Friday at 8am

1

Did you add this time in your calendar?

2

Commit to zero distractions during this time, no calls, no emails, no texts.



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YEAR RECAP

1. Total income received _____
2. Total business expenses _____
3. Total deals closed _____
4. Total listing appointments _____
5. Total listings taken _____
6. Total listings sold _____
7. Buyer ends closed _____
8. Average sales price _____
9. Average commission check _____
10. Average hours worked per week _____
11. Present pending _____
12. Present inventory _____
13. Days worked _____
14. Total hours prospected _____
15. Total contacts in database _____



VISION

What is a vision?

The purpose of a vision is to help you clarify what is most important to you in your life, and to help you create it in reality.

Your vision shows you the big picture, your goal, and the end result. It represents what you are and what you are working towards. Your vision is your destination. Just as you walk out the door in the morning, and you know where you are going for the day, your grand vision helps you to clarify your life path.

Your vision begins as a thought, or something you want to create in your life. Your vision encompasses all areas of your life, your relationships, home, health, career, finances, travel, your contribution to the world and your deep fulfillment.

The main purpose of life is your happiness. Therefore, everything you state in your vision must bring you happiness. It is important to recognize that your happiness is vital to your life, and you must give yourself permission to be happy and create the life you most want to live. You are entitled to be happy.

Everyone's vision is different, everyone has different values, different perspectives and different goals. Yours are unique to you, they are important and must be honored. We need a vision for our lives, otherwise, we tend to be aimless, fall into jobs, situations and relationships that are not good for us, and not in alignment with who we really are. If we do not know who we are or what we want, someone else will decide for us. Having a clear vision, and working towards that vision, brings happiness and fulfillment. As you create your vision, think BIG, think happy and think fulfillment.

Your vision will keep you focused, on track and moving forward towards your goals, in alignment with your values. It will excite you, uplift you, encourage you, and keep you inspired when times get tough. It will serve as a guide for your long-term and day-to-day decisions. Your vision is not carved in stone, it will evolve over time. As you actualize some of your goals you can add new ones.



VISION

Importance of having your own life vision

Write down why it is important for you to have your own vision, to respond to your true calling and live a life of happiness and fulfillment.

What will happen if you don't have your own plans and goals?



MY VISION

What makes me feel truly happy and fulfilled? (being with my family, being in the moment, writing, cooking, camping, etc.)

What are my natural talents? What have I always done well and enjoyed since I was a kid? When you engage your talents, there is no effort, time slips by and you feel really happy and fulfilled. (sports, organizing events, seeing solutions others can't see, making people feel welcome, gardening, etc.)

What is my biggest dream? What have I always wanted to do since I was a child? If I could do anything, I knew I could not fail, what would I do? (become an astronaut, climb the highest mountains, invent a new technology that cleans up pollution).

Write down your vision for the life you want to create, that includes the above.



GOALS

Write down 3 goals you want to achieve in 2024 to activate your vision and begin to turn your vision into reality.

1

2

3



COMMITMENT

Write down your new clarity, realizations and breakthroughs. What have you discovered about yourself.

What changes and commitments are you ready to make?



PRODUCTION GOALS

1. Income goal _____
2. Closed deals goal _____
3. Listing appointment goal _____
4. Listings taken goal _____
5. Listings sold goal _____
6. Buyer ends closed goal _____
7. Goal hours per week _____
8. Goal days worked _____
9. Prospecting goal _____
10. Contacts in database goal _____
11. Hours worked per week goal _____



YOUR PERFECT BUSINESS



- 1.
- 2.
- 3.
- 4.

What could your lead gen engines be in the future?








YOUR PERFECT BUSINESS

What inspires you?

What lead gen engines should you grow?

DEFINE STUFF VS. ENERGY

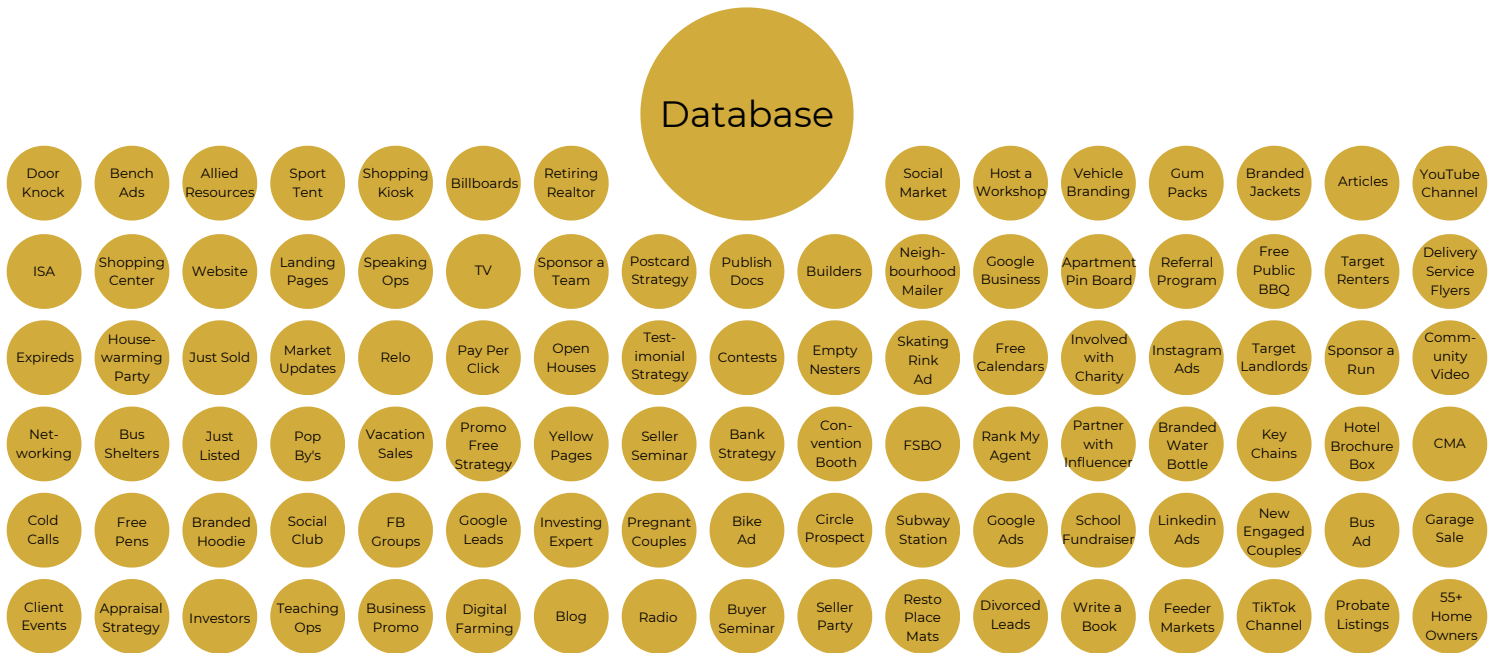
STUFF	ENERGY
	
	
	
<ul style="list-style-type: none">• Tours with buyers• Paperwork• Deliveries• Opening doors• Fluff conversation• Wasted time• Unmotivated clients	<ul style="list-style-type: none">• People who listen to me• Love negotiating• Love referrals• Like working with investors• Like working with estates• Boundaries• Breaks• People who like me• Close deals• Motivated client

STUFF → ENERGY → TRANSFER



BUSINESS

Where will it come from in the next year?



NOT ALL LEAD ENGINES ARE EQUAL

High \$ Low Leverage

You may be investing too much for too little return.

High \$ High Leverage

You are investing a lot and getting a lot in return

EFFECTIVENESS

Low \$ Low Leverage

You are not investing a lot but you are not seeing a return

Low \$ High Leverage

You are not investing a lot and getting a lot in return



BUSINESS

What are you willing to change in your lead generation systems?
Who does it? By when?

Item to Change	How? Who?	Target Date

How will you stay accountable?

Who will help you stay accountable?



My 90-DAY HABIT BUILDER

Successfully build a habit. Failure is part of the process, but you need to minimize it to less than 15% of the time by succeeding at least 90 out of 100 days.

HABIT is:

In which area of your Life?

(circle one)

Personal
Life

My Job

My
Relationships

My
Business

My
Finances

My
Health

1 ★ Start Day	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40
41	42	43	44	45	46	47	48	49	50
51	52	53	54	55	56	57	58	59	60
61	62	63	64	65	66	67	68	69	70
71	72	73	74	75	76	77	78	79	80
81	82	83	84	85	86	87	88	89	90
91	92	93	94	95	96	97	98	99	100 ★ You did it!



DAILY SCHEDULE

7:00am-7:30am _____

7:30am-8:00am _____

8:00am-8:30am _____

8:30am-9:00am _____

9:00am-9:30am _____

9:30am-10:00am _____

10:00am-10:30am _____

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5:00pm-5:30pm _____

5:30pm-6:00pm _____

6:00pm-6:30pm _____

6:30pm-7:00pm _____



WEEKLY SCHEDULE

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday



WEEKLY SCHEDULE

MON

TUE

WED

THU

FRI

SAT

SUN



CHALLENGES & SOLUTIONS

1.Challenge:

Solution:

2.Challenge:

Solution:



CHALLENGES & SOLUTIONS

3.Challenge:

Solution:

4.Challenge:

Solution:



GROWTH PLAN

	PERSONAL	FAMILY	EDUCATION/GROWTH	BUSINESS
More of				
Less of				
Start Doing				
Stop Doing				
Invest Into				
Go to				



3-2-1 Year goals

STOP You will be tempted to start by filling in your financial goals and building your business plan.

Before you do this, take some time to reflect on your **LIFE** and consider what you want it to look like three years in time.

- How will you balance your time?
- What role would you like to fill in your business?
- How much income would you like to earn?
- Who would you like to be working with?

Think about how old you, your children and your spouse will be. What will you want to do for leisure?

Think about your investments. Think about other businesses you would like to be a part of. Think about what you would be excited to spend your time working on each day.

Start by filling the sheet in from top left (3 years personal) to top right (3 years business) and then move backwards to the 1 year row.

- Do the goals stack appropriately?
- Are they attainable?
- Do they seem challenging?

Ideally goals should be attainable but difficult. Make sure the growth arc you are considering is realistic. Most importantly, make sure this is a ride you are going to enjoy.



3-2-1 Year goals

3 YEAR LIFE VISION

3 YEAR BUSINESS VISION

2 YEAR LIFE VISION

2 YEAR BUSINESS VISION

1 YEAR LIFE VISION

1 YEAR BUSINESS VISION



3-2-1 Year goals

PERSONAL

BUSINESS

YEAR 3	Growth Goals	Growth Goals
	Health	Work/Life Time Freedom
	Spirit	Income
	Fun	Job/Role
	Relationships	Mentoring Others
	Passion Project	Wealth Building

YEAR 2	Growth Goals	Growth Goals
	Health	Work/Life Time Freedom
	Spirit	Income
	Fun	Job/Role
	Relationships	Mentoring Others
	Passion Project	Wealth Building

YEAR 1	Growth Goals	Growth Goals
	Health	Work/Life Time Freedom
	Spirit	Income
	Fun	Job/Role
	Relationships	Mentoring Others
	Passion Project	Wealth Building



1-3-5

As you begin setting your goals, it is important to build a solid system on how you plan to achieve the goals you have created. Developing your system is the most important step to take in working towards your goals.

Find your BIG WHY!

The first step in your master plan towards success will be determining your WHY. This may be a difficult question to answer, but will help motivate you during the tough days.

POINT: Be honest with not only yourself, but also those around you. Avoid making your goal one to please the masses.

Example:

- Find a positive work-life balance
- Develop a sustainable healthy lifestyle
- To be successful in my independent business
- Make more money than you need to and save \$100,000/year

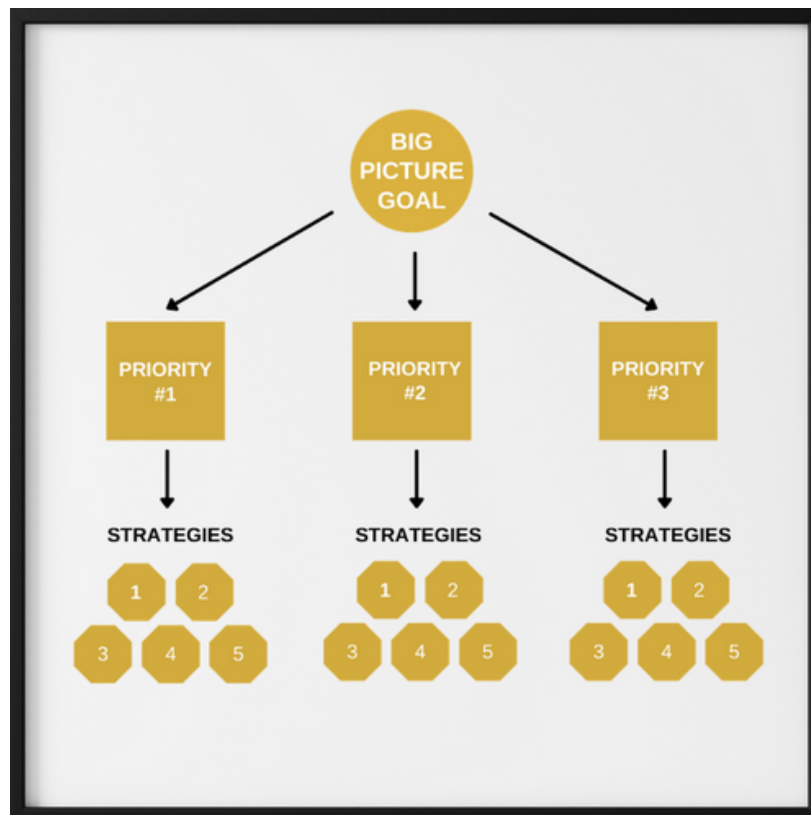


1-3-5

Overview

Now that you have determined your BIG WHY, the next step is to establish your "Big Picture Goal". The 1-3-5 Framework starts with 1 goal, this goal is then divided by 3 priorities, each priority is then broken down into 5 strategies.

Your goals and priorities should be achievable targets. Strategies are meant as a guideline to help you attain a priority. Once strategies for all 3 priorities are completed, your goal should be achieved.



1-3-5

Priorities

After determining your goal, it's time to move on to your measurable priorities. The idea behind priorities is to split your goal into 3 big steps.

Keep in mind that these priorities should always be in your control, for example: you cannot control how long a listing will remain on the market, however you can control your marketing strategy. These targets are meant to make your goal more attainable.

Examples:

- Double my lead generation results
- Strengthen my skills and systems
- Get fit and healthy



1-3-5

Strategies

In order to make your priorities realistic and attainable, the next step is to break your priorities into 5 simple steps. By creating steps that are both small and impactful, you are more likely able to successfully achieve your goal.

Example:

Big Goal: 24 deals per year

Priority 1: Double my lead generation results

Strategies:

1. Create Canadian-Wide referral strategy
2. Participate and utilize the market center's client events
3. Call 10/text 5 people per day
4. Join a BNI group
5. Create a relocation strategy

Priority 2: Strengthen my skills and systems

Strategies:

1. Get an accountability/script partner
2. Recreate and practice my buyer presentation
3. Create and strengthen my listing presentation
4. Create a prelisting presentation
5. Enroll in coaching

Priority 3: Get fit and healthy

Strategies:

1. Daily 20 minute fitness
2. Eat better
3. Monthly massage
4. Meal prepping lunches the night before
5. Pay for 1 trainer session per week



1-3-5

BIG GOAL

PRIORITY 1

Strategy 1

Strategy 2

Strategy 3

Strategy 4

Strategy 5



1-3-5

PRIORITY 2

Strategy 1

Strategy 2

Strategy 3

Strategy 4

Strategy 5



1-3-5

PRIORITY 3

Strategy 1

Strategy 2

Strategy 3

Strategy 4

Strategy 5





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