

**Annual Planning Meeting (hold meeting in early/mid November)**

0. Prepare in advance – this is the most critical step! Have a packet ready for all attending:
- ✓ Buy new wall calendar (or use Buffini version) and day planner
  - ✓ All job descriptions and checklists, Client Profile, Listing Question Forms, Buyer Info and Seller Info Sheets etc. (hard copies) from the server
  - ✓ Manuals (now on server)
  - ✓ Business Outline
  - ✓ All ads and marketing (website, Facebook, Craigslist, flyers ,email signature, Visual Tours, fax coversheet, etc)
  - ✓ Our current, previous year's figures and the market's (see #2a) from Statistics of Importance, Buffini reports, and Listing20XX report
  - ✓ Forecast/Budget from current and previous year (see #2c) from DAAnnualForecastBudget spreadsheet
  - ✓ Tell all attendees to think about goals for the following year
  - ✓ Mission statement and core values
  - ✓ Bring laptop
  - ✓ Pre-order lunch
  - ✓ Hire facilitator and minute taker?

**Questions to ask myself before the meeting (from Peak 2012):**

- 1) For the market:
  - a. What's the history?
  - b. What am I observing today?
  - c. What are the future possibilities?
- 2) For myself:
  - a. What have I achieved?
  - b. What have I learned?
  - c. What do I want my lifestyle to look like?
- 3) For my business:
  - a. What do I need from my business?
  - b. What do I like about my business?
  - c. What do I dislike about my business?
  - d. What do I want my company to look like?
- 4) Things to remember/consider:
  - a. Don't confuse activity/momentum with actual success!
  - b. Opportunities will be coming at you, so only focus on what you really want.
  - c. The fact that you can do it doesn't mean that you should do it.
  - d. It isn't that you won't let people down... it is which people are you going to let down.

**Questions/Comments for the team to open the meeting (from Pat Lencioni)**

- 1) Trust is built by being vulnerable.
  - a. Ask "what was your birth order and what was the hardest part of that as a child growing up?"
- 2) Argument and conflict is the pursuit of what is best... what is true!

1. Review Mission Statement and Core Values
  - a. Provide examples of when they were practiced
  - b. Ask the following questions of each attendee
    - i. Why are we here and why are you here?
    - ii. Where are we going and where are you going?
2. Review Last Year's Numbers/Goals
  - a. Compare our figures to previous year and to market's current and previous year
    - i. # of listings, # sales, average sale price, list to sale price ratio
    - ii. average commission (in \$ and %)
    - iii. DOM
    - iv. interest rates
    - v. number of agents
  - b. Income → Sales → Appointments → Leads → Contacts → Days Worked
  - c. Analyze Budget versus actual P&L and compared to previous year's figures
3. SWOT Analysis
  - a. Strengths and Weaknesses (internal)
  - b. Opportunities and Threats (external)
4. LUNCH / Open Session
  - a. Thoughts and ideas from everybody
  - b. Alignment with Mission
5. "What's working, what's not" Exercise
  - a. What did we do that we want to do again / don't want to do again?
  - b. What value can we add to our clients?
  - c. What do we hate doing that really doesn't add value to our clients?
  - d. What could we add or remove that could help our experience of working together?
6. Review Current Systems and Operations
  - a. Employee Orientation Sheet (only new additions to it)
  - b. Review each job description and discuss what can be improved upon
  - c. Review advertising methods and processes
  - d. Review website (look for dead links and broken forms)
  - e. Review marketing material (congruent cards, letterhead, email signature, etc.)
  - f. Review all other systems and operations that can be improved
7. Power Planning Session (Next Year's Business Plan)
  - a. Set Goals: Long Term (3+), Mid Range (1-3 yr), Short Range (Qtrly - 1 yr)
  - b. Define Action Steps/Responsibilities to overcome challenges for each goal
  - c. Create Budget (analyzing expected cost and profit for each goal)
  - d. Create timelines on the calendar
    - i. include marketing plan, seminars and classes, personal days / vacations
  - e. Create tracking systems for follow up and adjustments
  - f. Plan for celebration upon completion of major goals
8. Record meeting minutes and deliver for follow up at the monthly workshops
9. Schedule a "happy hour" to celebrate winning the current year and toast to the journey ahead!

*“Most people aim for nothing and hit it with amazing accuracy!” – Joe Niego*