



2021 Business Plan

Name

Company

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Select and complete sections that are applicable to your individual situation.

Company History and Statistics

Company Name:

Location:

Owner(s):

12 MONTH HISTORY – indicate the number of orders, closings, and/or monthly revenue over the last 12 months.

Category	Best Month		Worst Month	
	Company	Individual (if different)	Company	Individual (if different)
Orders				
Closings				
Revenue				

CLIENT BASE - break down current client base information by the types of clients and percentage of business

Type of Client	Percentage of Business		Comments/ Notes
	Current	Goal	
Realtor			
Lender			
Attorney			
Builder			
Other			

TYPE OF BUSINESS - break down the type of business currently receiving

Type of Business	Percentage of Business		Comments/ Notes
	Current	Goal	
Purchase			
Sale			
Refinance			
Attorney			
Commercial			
Other			

Company SWOT Analysis

Completing a SWOT Analysis on your company can help to analyze your organization’s strengths, and weaknesses, and identify opportunities and threats that impact the company’s success.

STRENGTHS

What does your company do well?
What unique resources are available?
What do others see as your company’s strengths?

WEAKNESSES

What could your company improve on?
Where does the company have fewer resources than others?
What are others likely to see as weaknesses?

OPPORTUNITIES

What good opportunities are open to your company?
What trends could your company take advantage of?
How can you turn the company’s strengths into opportunities?

THREATS

What trends could harm you?
What is your competition doing?
What threats do your company’s weaknesses expose you to?

Top Customers

At times, the easiest way to grow our business is with current customers. Identify your top customers, why they are your top customers, then identify growth opportunities.

Customer Name: _____ Company: _____

Why is he/she a top customer (check all that apply)? Quantity of orders Quality of orders
Loyal (does not use another company) Other: _____

Opportunities for growth (examples: can assist growing their business, can earn more business, referrals, etc.) _____

Customer Name: _____ Company: _____

Why is he/she a top customer (check all that apply)? Quantity of orders Quality of orders
Loyal (does not use another company) Other: _____

Opportunities for growth (examples: can assist growing their business, can earn more business, referrals, etc.) _____

Customer Name: _____ Company: _____

Why is he/she a top customer (check all that apply)? Quantity of orders Quality of orders
Loyal (does not use another company) Other: _____

Opportunities for growth (examples: can assist growing their business, can earn more business, referrals, etc.) _____

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Loyal (does not use another company) Other: _____

Opportunities for growth (examples: can assist growing their business, can earn more business, referrals, etc.) _____

Mission Statement

A company's **mission statement** should be concise and specific, so the customers understand your purpose and how you provide value to them. The **mission statement** is focused on what the company does for its customers and keeps employees focused on objectives.

Does your company have a mission statement? If so, what is it? If not, prepare one for your own use or to share for company use. Not sure where to start? Search “mission statements” on Google for assistance.

Target Market

A well-defined target market helps you and your company develop effective marketing strategies. Complete the following information based on characteristics of your target market.

Describe the demographics of your target market. Factors may include age, location, gender, income levels, educational levels, marital or family status, occupation and ethnic background.

What key influences motivate your customer to do business with you and your company?

What is the size is your market?

What are some of your current market trends?

Competitor Worksheet

Who do you compete with in your market?

1: Competitor Name: _____ **Company:** _____

He/she is stronger than me; weaker than me; equal to me.

His/her characteristics (i.e., competitive and comparative advantages and disadvantages):

2: Competitor Name: _____ **Company:** _____

He/she is stronger than me; weaker than me; equal to me.

His/her characteristics (i.e., competitive and comparative advantages and disadvantages):

3: Competitor Name: _____ **Company:** _____

He/she is stronger than me; weaker than me; equal to me.

His/her characteristics (i.e., competitive and comparative advantages and disadvantages):

To further analyze your competitors, use the Competitor SWOT Analyst worksheet.

Competition Details

After completing the Competition Worksheet, take a closer look at your competition, market share, and more.

What type of business competes with yours?

What market share does each competitor control?

1.) _____

2.) _____

3.) _____

How would you rate your competitor's position?

1.) _____

2.) _____

3.) _____

Who will be your competitors in the future? (Industry changes create changes in competition)

1.) _____

2.) _____

3.) _____

Competitor SWOT Analysis

You identified competitors in your industry. Knowing who he/she is provides you valuable knowledge when working with your customers and/or prospects. Now take a moment to truly “know” your competitors by completing a SWOT analysis on each.

STRENGTHS

What does your competitor do well?
What unique resources are available?
What do others see as your competitor’s strengths?

WEAKNESSES

What could the competition improve on?
Where does the competitor have fewer resources than you?
What are others likely to see as weaknesses?

OPPORTUNITIES

What good opportunities are open to your competitor?
What trends is the competition taking advantage of?
How is the competition turning the strengths into opportunities?

THREATS

What trends could harm the competition?
What are you doing that could be a threat to your competition?
What threats do your competitor’s weaknesses expose them to?

Individual SWOT Analysis

Have you ever taken the time to truly analyze your Strengths, Weaknesses, Opportunities and Threats? If so, when was the last time you reviewed the information? Has anything changed? Have recent industry changes created opportunities or threats for you? You may find it helpful to talk to your peer(s), mentor(s) and/or manager.

STRENGTHS

What do you do better than anyone else?
What personal resources can you draw on?
What do others see as your strengths?
Which achievements are you most proud of?

WEAKNESSES

What tasks do you usually avoid because you don't feel confident doing them?
Are you completely confident in your knowledge and skills?
What are others likely to see as weaknesses?
What are your negative work habits?

OPPORTUNITIES

What new technologies can help you?
Is your industry growing?
If so, how can you take advantage of the current market?
Is there a need in your company or industry that no one is filling?
How can you turn your strengths into opportunities?

THREATS

What obstacles do you currently face at work?
What is your competition doing?
Could any of your weaknesses lead to threats?
Is your job changing?

Value Statements

It is essential for every sales professional to know how to let clients and prospects know that you can provide value. A value statement is used primarily to generate interest and curiosity from the prospect but should include: 1) potential value you can bring to a customer; 2) differentiate you from your competitors, and 3) provide a foundation for resolving customer concerns. Use the space below to outline a Value Statement you might use with your prospects.

Professional Development

What do you want to accomplish professionally this year? List three high level goals.

Marketing and Sales

Identify the sales and marketing initiatives you and your company use to create brand awareness and increase business.

What is your company's marketing message?

What is your marketing message? (Capability statement, 30-second elevator speech, etc.)

What marketing medium does your company use? (Website, social media, print ads, etc.)

What marketing medium do you use? (Social media, networking meetings, etc.)

What other sales and marketing strategies do you want to employ?

What tools and resources will you use and how will you use them? (Website resources, mobile apps, Best Practices compliance manual, etc.)

Identify the members of your company's sales team:

Who sets your goals and how are you held accountable?

What systems do you use to help determine the effectiveness of your marketing plan?

How do you quantify your success? (orders, closings, revenue, etc.)

Ideal Customer Profile

Your ability to clearly define your ideal customer will determine your success. What does your ideal customer look like? Recognizing essential elements or characteristics of the type of customer you want to do business with will help improve your capture rate and eliminate prospects who are not good potential customers.

How would you describe your ideal customer?

What prospective customers are the most likely to buy your product or service?

What are the most important qualities your ideal customer should have?

Top 10 Target Prospects

Now that you know what your ideal customer looks like, review your current prospect list and identify your Top 10 Target Prospects.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

Next 5 Target Prospects

11. _____

12. _____

13. _____

14. _____

15. _____

MP Goal Worksheet

NOTE: Use the SMART Goal methodology outlined in the Mentorship Program Participant Guide to help you define your goal(s).

My sales goal for the Mentorship Program is:

Was the goal met? Yes No Not Yet

If goal was not met, what's next?

My professional development goal for the Mentorship Program is:

Was the goal met? Yes No Not Yet

If goal was not met, what's next?

My time management goal for the Mentorship Program is:

Was the goal met? Yes No Not Yet

If goal was not met, what's next?
