

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 (3 copies) from the server, Client Profile, Listing Question Forms, etc.
 - ✓ Manuals (just bring the binder)
 - ✓ 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 DAAnnual ForecastBudget 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?

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
 - ii. # sales
 - iii. average sale price
 - iv. list to sale price ratio
 - v. average commission (in \$ and %)
 - vi. DOM
 - vii. interest rates
 - viii. 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. Review Employee Orientation Sheet (only new additions to it)
 - c. Review each job description and discuss what can be improved upon
 - d. Review advertising methods and processes
 - e. Review website (look for dead links and broken forms)
 - f. Review marketing material (congruent cards, letterhead, email signature, etc.)
6. Power Planning Session (Next Year's Business Plan)
 - a. Set Goals: Long Term (5+), Mid Range (1-5 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
7. Record meeting minutes and deliver for follow up at the monthly workshops
8. Go out to a nice dinner to celebrate winning the current year and toast to the journey ahead!

