2026
BUSINESS & VISION
commitment plan
FOR REAL ESTATE AGENTS

STANDARDS+COMMITMENT=FREEDOM

CORE SALES TEST

Please Circle

1. I average 5-15 sides/month at $7,500 as a Real Estate Agent — Yes No
2. I see 15 people face to face every week. — Yes No
3. I send 10 thank you cards every. — Yes No
4. I have 5 Break Breads with influential people every week. — Yes No
5. I talk to 60 people every week. — Yes No
6. I have a 10-person whale list that I work weekly. — Yes No
7. I have a Top 50 Favorite VIP list, and I call 12 per week. — Yes No
8. I mail to my database of at least 400 contacts once every month. — Yes No
9. I call all past clients to do annual reviews four years back. — Yes No
10. I have a Top 50 Favorite Past Clients list, and I call 12 per week. — Yes No
11. I generate 50 leads per month. — Yes No
12. I perform Tuesday Update Calls for all my clients and referral sources every week. — Yes No
13. I send 1,000 video emails per month. — Yes No
14. I have two channel accounts that send me 10 deals each per year. — Yes No
15. I listen to at least two training audios every month. — Yes No
16. I do a Happy Hour every month. — Yes No
17. I spend four hours per day selling and prospecting for new business. — Yes No
18. I survey every client and receive a minimum score of 8 out of 10 on 90% of my surveys. — Yes No
19. I hold or attend one group training or seminar every month. — Yes No
20. I send birthday cards to my Top 50 Past Clients and Top 50 Favorite VIP list. — Yes No

Total possible "Yes" scores for this section: **20** **Your score** _____

Score 17 – 20: You are doing the work and your income should be $250,000 – $1 million.

Score 12 – 16: You are on your way and your income should be $125,000 – $300,000.

Score under 12: You probably should find a new job

Name _____

2026 GOAL SETTING w/ Dan Keller

Step One: Your Goals need to be **SMART** goals. SMART goals have a higher chance of coming true.

- **S**pecific
- **M**easurable
- **A**chievable
- **R**ealistic
- **T**imely

"The reason most people fail at achieving their goals is because they give up what they want MOST for what they want now. Talent isn't the issue. Mindset is."

Transactions Closed Last Year By Month (units)

	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
2025												
(2026) Goal												

How many deals did I close in 2025? _____ *Add 10%, = your goal for 2026* _____

*How much did I earn in 2025?*_____ *How much will I earn in 2026* _____

Knowing Your Business:

☐ Where did my business come from in 2025: | Where Do You Want To Improve?

Database _____ _____

Social Media _____ _____

Business People _____ _____

Open Houses _____ _____

Simple RE Agent Business Model ***(rate 1-5, "5" being perfect):***

- Master yourself first - Personal growth and development _____
- Skill improvement – presentation/sales skills _____
- Consistent Lead Generation _____
- Buyer/Seller process _____
- Ace the money game, tracking your money _____
- Past Client follow-up/retention/referrals _____

(circle the top 2 that need to improve)

What is your biggest struggle right now that you want fixed? _____

_____

dankeller MORTGAGE ADVISOR MLO# 115349 naf newamerican FUNDING

Name: _____

Date: _____

2026 Business Plan

	What Needs To Be Improved?	What Specifically Will That Look Like?
WORK		
MONEY		
SELF		
LOVE LIFE		
FAITH		
FAMILY		

Transactions Closed Last Year By Month (units)

	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
2025												

	Current	1-yr (2025)		Current	1-yr (2026)
2025 Closed Volume			Cash Savings		
Stocks Net Balance			Investment Homes		
401k Balance			Equity In All Homes		
Debt (minus Mtg)			Your Age		

What is your biggest challenge right now? _____

Are you on track to retire? Yes_____ No _____

Are you on track? Take your age & multiply it by your 2023 W2 income, and divide by 10. 36 yrs old x $175k income = $6,300,000, divided by 10 = $630k, you should have $630k invested

What is your 5-year vision? Five years from now, what have you accomplished? Who will you have become? What are you working toward every single day? Bigger picture thinking here. Think BIG.. Dream a little here! Write in paragraph form, who you will become in 5-years with your work, money, love life, faith, self, and family (6 areas form the 'Where Will You Be Form'). Make sure to use dates.

Example: *"It is December 2, 2030, I am closing 11 transactions this month, 8 of them from referrals! I will end the year with 72 total transactions, 7 ahead of my goal of 65! We just topped $1.5m cash net worth, are debt free and will be purchasing our next investment home in March 2029! My team is.....*

THE CORE TRAINING 10 REALTOR® LAWS

1. **Call 10 of 40 VIPs EVERY Monday (*goal: 4 leads per year from each*)**
    a. Let them know they are on the list (list includes family members, business owners, HR directors, etc.)
    b. Invite to a separate happy hour.
    c. Ask how you can help them with their business.
    d. All about you forms.
    e. Birthday program for A, B, and C's
2. **Database Calls (Goal of 400 people in Database) – Goal: 15% buy/sell/ref. per year**
    a. Letter of the week calls (call every client 2x/yr. minimum)
    b. LOTH (minimum of 6/yr. – mail or video)
    c. EOS (minimum of 6/yr. – mailed)
    d. Client party (1 min/yr.)

    Top 50 Past Clients (for graduates + agents closing more than 10 deals/month)
    a. Call 12 EVERY Thursday (these people are not on VIP list)
    b. Keep information about them to weave into conversation.
    c. Invite to a separate Happy hour, monthly.
    d. Birthday program
3. **See 10 people Face – to – Face Per Week**
    a. Listing appts/showing appts/ 40 VIPs/Top 50 past clients
    b. Break bread with 3 of them every week.
    c. Always be interested in them.
    d. Come bearing gifts as often as possible.
4. **Lunch and Learn – 2x/year.**
    a. Educational events – personal $/budget, will vs. trust, self-defense, etc.
    b. Serve lunch or snacks and beverages.
    c. Send video invite.
    d. Collect survey at the end.
5. **Gifting**
    a. Spouse
    b. Cheesy
    c. VIP, random
    d. Birthday
6. **Team Culture**
    a. Employee of the month
    b. Compliment Tree
    c. Team Outing
    d. Potluck
7. **Builders**
    a. Milk route EVERY Friday
    b. Bring food
    c. Follow up on Monday with a call.
    d. Handwritten note

    Geographic Farm
    a. Start with 500-1000 rooftops.
    b. Send mailer monthly.
8. **20 Whale List (goal: 12 leads per year from each)**
    a. Builders/rich people/ anyone influential that you would love to know.
    b. Regular calls to get appointment.
    c. Personalized gifts to WOW them.
    d. Meet 4 new people/month – attend event (charity/political)
9. **Video Program (send 500 videos per week to different list/sites/etc.)**
    a. 40 VIPs
    b. 400-person database
    c. Builders
    d. Business – introduce a vendor partner.
10. **Self-Balance**
    a. Workout 3x/week
    b. Spiritual/motivational reading daily
    c. Date with spouse
    d. Date with kids
    e. Gratitude journal