A 30-Day Action Plan for Experienced Agents

The key to taking action for experienced agents is to analyze what you are currently doing, create an immediate Next Step, and design a plan to attain that Next Step. Here is a way to develop your own Action Plan that allows you to focus on what you need to accomplish to bring your business to the Next Step.

Step 1: Self-Assessment. The key to self-assessment is to objectively view your current strengths and weaknesses. One of the best ways to do this is to use the Ben Franklin technique. List your strengths in one column and your weaknesses in the other.

Step 2: Target a Weakness. Since your goal is to improve your current business practices and reach your Next Level, you can now choose an item listed in your Weaknesses column and turn that weakness into a strength.

For example, let's say that one of your weaknesses that you would like to target is "I need to utilize automation in my planning and in sending letters, faxes, and/or e-mails to my clients, customers, and support people."

Step 3: Set Your Next Step Goal. Each goal that you set has some individual elements that should always include:

- What you want to accomplish.
- When you will attain your goal (also known as the "due date").
- The reward or benefit that you will receive when you attain your goal.

Our example might look like this:

- To learn and use my computer and it's programs for business planning and keeping in touch with everyone.

- I will have this done by _____ (date by which you will have achieved this goal).

- Better time management, improved follow-up, consistent updating of clients, customers, and other agents who are involved in my deals, as well as my support staff/administration department/management team.

Step 4: Create a Plan to Achieve Your Goal. This is where you list every step you need to take, in the appropriate order, and how you plan to take that step.

Example:
List the tasks needed to achieve my goal:

- Learn to use my computer for planning and scheduling.

- Weekly planning

- To-do lists

- Client and customer follow-up

- Prospecting

- Farming

Find out how other top agents use the computer to be more effective.

- Who are the successful agents who are automated in my office/company?

- What are they doing and what software/computers are they using?

Learn how to automatically send update letters, faxes, or e-mails for:

- Updates to homeowners who listed with me

- Updates to buyers currently in contract

- Tickler letters/faxes/e-mails to prospects

- Mail-merging letters to my farm, sphere, past clients, prospects, etc.

List the resources you think you will need.

Please understand that as you go through the processes of planning and taking action you will uncover many unexpected items (both positive and negative) that must be considered or accommodated in achieving your goal and reaching your Next Step.

Fill out your Action Plan Task List in the order of what you need to do and when you want to get it done.

A list is an easy way to get a hard job done. The key is in the old adage: "How do you eat an elephant? One bite at a time." Your objective in using this concept is to learn (mostly from trial and error) how to organize your ideas into a specific

list of what you must accomplish in order to achieve your goals. Your success as a real estate agent and in life is directly proportional to your ability to create your own plan of action and to be in action toward achieving your goals.

Step 5: Take Action Consistent with Your Goal.

This is where you tackle each item in your Action Plan one step at a time. The best way to do this is to remember to always adjust your Action Plan to include each step you must take to achieve your goal. In addition, you should always re-analyze what you are trying to achieve and how you are going about achieving it. My best advice here is "Don't try to reinvent the wheel"—meaning you should always be looking at how other top producers in your field and even in other businesses do what you are trying to do. For instance, if you're trying to automate in real estate, you should probably use an established real estate automation program like "Top Producer," so you can take advantage of what's already out there and being used by thousands of others in your industry who are currently doing what you are trying to do.