



# BUSINESS 気 PLANNING

## 2026 PRE-PLANNING PACKET

*(Please complete this packet prior to the training session.)*

## Pre-Business Planning Questionnaire

Please answer these questions for yourself. Money questions refer to 1099 income.

1. If you were to rate your level of excitement about the real estate business right now on a scale of one to ten, with one being "I'm ready to quit" and ten being "I absolutely love it!" Where would you rate yourself? \_\_\_\_\_
2. How much do you expect to make this past year? \$\_\_\_\_\_
3. Is that amount satisfying for you? \_\_\_\_\_
4. Did that amount include savings, debt reduction, investment money, recreation, dreams and giving?  YES  SOME  NONE
5. Do you know how much it takes to pay your household bills every month? If so, what is that amount? \$\_\_\_\_\_
6. Is your basic retirement taken care of? (By taken care of, do you have a plan to create residual income equal to or greater than your monthly household living expenses plus taxes?)  YES  NO
7. Did you do anything big and fun this year?  YES  NO
8. Did you take enough time off and/or vacation days?  YES  NO
9. Do you have any kind of a written Life List?  YES  NO
10. Are you proficient in your Ninja skills and practice?  YES  NO
11. Do you want to change your income?  YES  NO
12. Do you want to change your work-life balance?  YES  NO

Wheel of Life

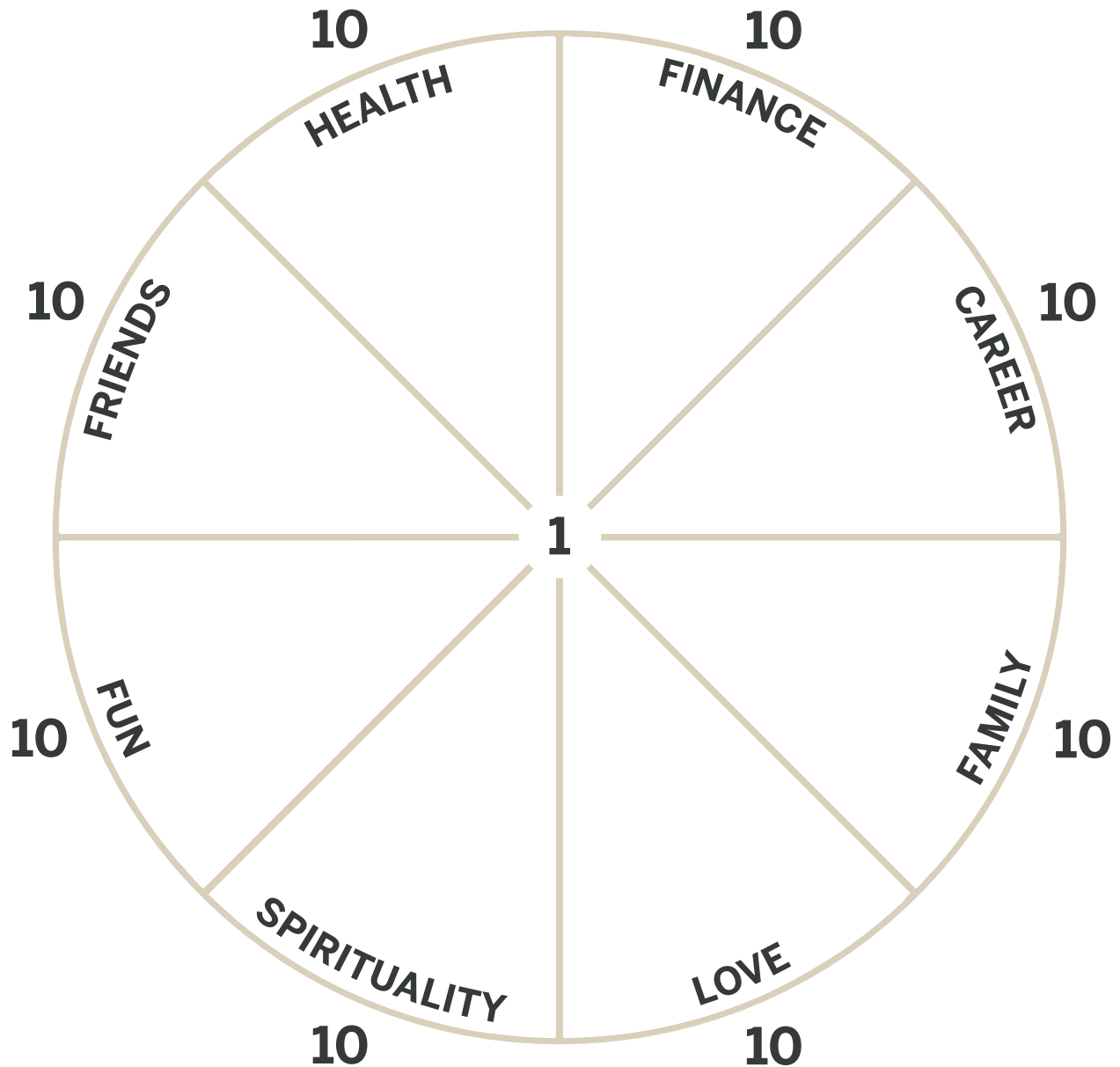
Access Your Life

Assess your level of fulfillment for each area on a scale of 1 to 10, with 1 being low and 10 being complete. Write the number in the section. What is your overall balance? What areas need attention?

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## What Do You Want MORE of?

Circle the items that jump out to you as something you want to work on. Reference Life List and/or Life Wheel.

### Career/Business

Job satisfaction  
Career growth  
Work-life balance

### Finance

Financial stability  
Income level  
Savings and investments

### Health

Physical health  
Nutrition  
Exercise and fitness

### Family and Friends

Relationships with family  
Social connections  
Support network

### Romance/Significant Other

Romantic relationships  
Emotional intimacy  
Partner satisfaction

### Personal Growth

Self-development  
Learning and education  
Personal goals

### Fun and Recreation

Hobbies and interests  
Leisure activities  
Vacation and travel

### Contribution/Giving

Volunteering  
Community involvement  
Philanthropy

### Physical Environment

Home environment  
Workplace environment  
Living conditions

### Spirituality

Personal beliefs  
Connection to a higher power  
Inner peace and fulfillment

### Emotional Well-being

Stress management  
Mental health  
Happiness and contentment

### Other:

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### Identify what you want most.

To attract, you must have clarity. From the work you did with the Life Wheel and the MORE worksheet, list goals you wish to focus on right now, both personally and professionally.

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## My DNA: The Genealogy of My Business

The goal of this exercise is to identify the true source of your closed sales, uncovering the DNA or blueprint of where your business is coming from.

**Step 1:** List your closed transactions 12 months back: An MLS printout or a printout from your company is great.

**Step 2:** Include the GCI (Gross commission earned) on each transaction. Sort from highest commission to lowest.

**Step 3:** Use the spreadsheet to track and analyze your results.

You can download My Business DNA Spreadsheet and all other business planning handouts and resources at: <https://ninjaselling.com/businessplanninghandout>

**Step 4:** Trace each transaction back to its original source. For example let's say you sold a house to Alex and Rachel this year. They are the kids of some good friends of yours, Phil and Lee Davis. You could call that a personal referral but let's trace the genealogy.

Where did you meet Phil and Lee? You were introduced to Phil and Lee by your friends, Jason and Robyn, to whom you sold a house six years ago.

Where did you meet Jason and Robin? You met them at an Open House you held four years ago.

The originating source of the sale to Alex and Rachel is really an Open House, not solely a personal referral.

**Step 5:** Go through each transaction and identify the key action items, flow and client changes that created the closed lead.

In this case, you have been drip emailing Phil and Lee, and had a client appreciation event recently where they mentioned their kids would be buying soon when you did a FORD call. You also had them on a drip email campaign.

Write down the key action items from each transaction that resulted in the client on a separate sheet of paper and see if a trend emerges.

What trends and/or data can you spot?

What FLOW action items are consistently getting you closed deals?

When you look at the highest commissions closed, which of your actions are the most profitable?

Do you have one or more raving fans who have referred you to clients who have transacted? If so, list them out:

What life changes triggered a move with clients? Any patterns?

## Preflight Checklist

Rate yourself from 0 (none) to 10 (high).

### MINDSET

I have an abundance and growth mindset.

**NONE**    1 2 3 4 5 6 7 8 9 10    **HIGH**

I attend sales meetings on a regular basis.

**NONE**    1 2 3 4 5 6 7 8 9 10    **HIGH**

I am a consistent ambassador for our company.

**NONE**    1 2 3 4 5 6 7 8 9 10    **HIGH**

I have positive reading or listening queued up and ready, making it easy to ingest each day.

**NONE**    1 2 3 4 5 6 7 8 9 10    **HIGH**

### SYSTEMS

I have blank personal notecards readily available that I like to use to write a note.

**NONE**    1 2 3 4 5 6 7 8 9 10    **HIGH**

I have a style of Hot List that I like to use and I review it daily.

**NONE**    1 2 3 4 5 6 7 8 9 10    **HIGH**

I have a style of Warm List that I like to use and I review it daily.

**NONE**    1 2 3 4 5 6 7 8 9 10    **HIGH**

I have an electronic method to communicate successfully with my customers (CRM).

**NONE**    1 2 3 4 5 6 7 8 9 10    **HIGH**

I have a system for managing and thanking people who refer me business.

**NONE**    1 2 3 4 5 6 7 8 9 10    **HIGH**

### TIME MANAGEMENT

I start each day with my Ninja Five activities and time block my week for Ninja habits Six through Nine.

**NONE**    1 2 3 4 5 6 7 8 9 10    **HIGH**

## Preflight Checklist (cont.)

I show up early to my appointments.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I track my PIE Time.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

### DATABASE FLOW

I have a FLOW calendar for three touches a month.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I have the “correct” number of people in my database to earn the income I want.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I am willing to invest money in my relationships to grow my business. (At least \$2 per month per name.)

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I practice 50 live interviews each week using FORD.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

### NINJA PROFICIENCY

I am willing to practice my Ninja skills and scripts to master them.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I have completed the Ninja Installation.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I intend to attend a Ninja Installation this year.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I know my Sweet 16 Seller Questions.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

## Preflight Checklist (cont.)

I have mastered the 10-step Buyer Process and have my new buyer rep forms and buyer packets ready.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I know how to articulate my value proposition to a seller (five points of value).

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

### PERSONAL MASTERY

I know WHY I am in real estate.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I have a written set of life goals.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I have a written financial plan including a retirement Wake-Up Money plan.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I am a learner. (I read or listen to books regularly.)

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I exercise consistently.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I eat healthy.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I have mentors/role models from whom I learn regularly.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

## Preflight Checklist (cont.)

### SKILLSET

I have Buyer's and Seller's packets readily available.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I have Relocation packages readily available.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I have Buyer's Interview sheets readily available.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I have Pre-Listing Interview sheets readily available.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I have a written marketing plan for my listings.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

I use video in my personal marketing and branding regularly.

**NONE**    1   2   3   4   5   6   7   8   9   10    **HIGH**

FIND THE ITEMS with the lowest scores. Is there a section you struggle with?

Decide which of these skills you would like to implement. Make a list below of the ten you want to tackle.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## My Business Analysis of Last Year

### Overview Of My 2025 Business

My Database (CRM — Client Relationship Manager)

1. I have \_\_\_\_\_ households in my database.
2. I sent \_\_\_\_\_ FLOW mailings last year to my database.  
       \_\_\_\_\_ Email  
       \_\_\_\_\_ Postage mail
3. I have my database in a CRM that is working for me.  YES  NO
4. I can send an email to everyone right now.  YES  NO
5. I send personalized birthday and home anniversary cards to all my clients, or I text/call on their special dates.  YES  NO

### My Production (For the last 12 months).

1. My Gross Commission Income (GCI) for the last 12 months was \$\_\_\_\_\_.
2. I closed \_\_\_\_\_ transaction sides.  
       \_\_\_\_\_ were listing sides (sellers)  
       \_\_\_\_\_ were selling sides (buyers)  
       \_\_\_\_\_ contracts canceled (\_\_\_\_\_% of transaction sides)

Primary reasons for contract cancellation:

3. My average gross commission income per closing was \$\_\_\_\_\_.
4. I took \_\_\_\_\_ listings.  
       \_\_\_\_\_ Listings that have sold so far. \_\_\_\_%  
       \_\_\_\_\_ Listings that are still available. \_\_\_\_%  
       \_\_\_\_\_ Listings that expired or were withdrawn. \_\_\_\_%
5. \_\_\_\_\_ of my seller consultations resulted in the seller listing with another agent.
6. I sent \_\_\_\_\_ outgoing referrals and received \_\_\_\_\_ incoming referrals. My best sources for agent referrals are: (new)

## My Financial Drivers Spreadsheet

Use the spreadsheet to input your production drivers and evaluate how you can make changes.

You can download the Financial Drivers Spreadsheet and all other business planning handouts and resources at: <https://ninjaselling.com/businessplanninghandout>

### Market Data

My geographic service area is (specify towns and/or markets you cover):

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How many homes (units) sold in the last 12 months in your geographic service area? \_\_\_\_\_

What is the total dollar volume of this market (in millions or billions listed and sold in the last 12 months)? \$ \_\_\_\_\_

Average sales price in my market: \$ \_\_\_\_\_

My average sales price: \$ \_\_\_\_\_

How many sold homes over 1 million dollars (or three times market average)? \_\_\_\_\_

My ideal buyer demographics: \_\_\_\_\_

My ideal seller demographics: \_\_\_\_\_

My top three feeder markets: \_\_\_\_\_

### Source of Business (all leads, not just closed)

List the amount of:

1. Clients and database (sphere of influence)
2. Referrals from clients and database
4. Referrals received from or sent to REALTORS®
5. Website
6. Open houses and neighbors of open houses
7. Sign calls

8. Internet leads
9. Social media
10. Direct mail
11. Company referrals (relocation, etc.)
12. Other sources: \_\_\_\_\_

The names of my top raving fans this year (those that refer me repeatedly) are:

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### Discretionary Investments and ROI

(Where did I invest money to either grow my business or take care of my current clients?)

Worth It?

1.  YES  NO \_\_\_\_\_
2.  YES  NO \_\_\_\_\_
3.  YES  NO \_\_\_\_\_
4.  YES  NO \_\_\_\_\_
5.  YES  NO \_\_\_\_\_