
Become Unrecognizable in 2027

The Agent Business Planning Workbook

Build the Agent First. Then Build the Business.

Leave with a 2027 business plan you can actually execute.

Workshop	90-Minute Business Planning Workshop
When	Tuesday, October 13, 2026 10:00 AM
Where	First Team Real Estate — Mission Viejo Office
Name	

The Business I Want to Be Operating

Start with the destination before we calculate the numbers.

December 31, 2027

Imagine 2027 went exceptionally well — realistic, meaningful, and aligned with the life you actually want.

What kind of business am I running?

Think about the types of clients, listing/buyer mix, pipeline, referrals, lead generation, follow-up, reputation, and level of control you have over where business comes from.

What does a normal workweek feel like?

Consider your schedule, boundaries, family time, days off, evenings, weekends, and how reactive or intentional the business feels.

What am I known for?

How do clients, other agents, and people in the community describe me?

The Agent I Need to Become

Separate the business you want from the person capable of creating it.

IF SOMEONE FOLLOWED THE DECEMBER 2027 VERSION OF YOU FOR ONE WEEK, WHAT WOULD THEY NOTICE?

AREA	THE QUESTION TO ANSWER HONESTLY
Calendar	How do I protect the activities that create future business?
Follow-Up	How quickly and consistently do I follow up?
Skill	What do I practice instead of merely hoping I get better?
Market Knowledge	How well can I explain what is happening and what it means?
Consistency	What do I do even when I do not feel like doing it?

THE AGENT CAPABLE OF CREATING THIS BUSINESS IS...

1.

2.

3.

4.

5.

EXAMPLES

Disciplined, prepared, consistent, knowledgeable, proactive, organized, skilled, responsive, focused, confident, respected.

WHAT WOULD THEY NOTICE MOST?

The Identity Gap

No judgment. Just truth. We cannot close a gap we are unwilling to identify.

FUTURE ME How I operate when I am at my best	CURRENT ME Where I operate differently today

WHAT DOES THE 2027 VERSION OF ME NO LONGER TOLERATE?

1.

2.

3.

4.

WHAT CAN I START DOING IMMEDIATELY THAT WOULD BE EVIDENCE I AM BECOMING THAT PERSON?

My 2026 Business Snapshot

Use real numbers wherever possible. We are looking for evidence, not impressions.

2026 METRIC	ACTUAL
Gross Commission Income (GCI)	
Total closed sides	
Listing sides closed	
Buyer sides closed	
Listings taken	
Listing appointments held	
Average sales price	
Average GCI per closed side	
Approximate weeks worked	

MY TOP THREE SOURCES OF CLOSED BUSINESS

SOURCE	CLOSED SIDES	APPROX. % OF BUSINESS

2026 REFLECTION

What worked?

Which activities, sources, skills, or relationships created the best results?

What would I deliberately do differently?

If I could replay the year, what would I change?

My 2027 Business Target

Now define the business result. Keep it specific enough to reverse-engineer.

2027 TARGET	NUMBER
2027 GCI goal	
Average GCI per closed side (planning assumption)	
Closed sides required	
Target listing sides	
Target buyer sides	
Target listings taken	
Target listing appointments held	
Working weeks planned	
Weeks off / vacation planned	

MY DESIRED BUSINESS MIX

2026 ACTUAL	2027 TARGET	WHY THIS CHANGE?
Listing side %		
Buyer side %		

Why does this business matter?

What will this level of business fund, change, protect, or make possible in your life?

Reverse-Engineer the Math

Turn the annual result into the conversations, appointments, and commitments that create it.

A. CLOSINGS

START WITH	OPERATION	RESULT
Desired 2027 GCI	÷ Average GCI per closed side	= Closed sides required
Listing-side closings	+ Buyer-side closings	= Total closed sides
Total closed sides	÷ Working weeks	= Average closings per working week

B. CONVERSION PATHWAYS

PATHWAY	ANNUAL TARGET	MY CONVERSION	REQUIRED ACTIVITY
Listing appointments → signed listings			
Signed listings → closed listings			
Buyer consultations → signed buyers			
Signed buyers → closed buyers			
Meaningful conversations → closed sides			

C. MY WEEKLY LEADING INDICATORS

INDICATOR	PER WEEK
Meaningful real estate conversations	
Listing appointments	
Buyer consultations	
Business-development blocks	

ASSUMPTIONS

If you do not know a conversion rate, use the planning estimate supplied in the workshop and mark it as an assumption to validate during 2027.

My Vital Few

You do not need twenty strategies. Choose the few you are willing to execute deeply and consistently.

WHICH THREE BUSINESS-DEVELOPMENT PRIORITIES DESERVE THE MAJORITY OF YOUR ATTENTION IN 2027?

- | | |
|--|---|
| ☐ Sphere / Past Clients | ☐ Video / Content |
| ☐ Open Houses | ☐ Networking / Community |
| ☐ Geographic Farming | ☐ Client Events |
| ☐ Seller Prospecting | ☐ Online / Paid Leads |
| ☐ Database Follow-Up | ☐ Niche / Specialty |
| ☐ Agent Referrals | ☐ Other: _____ |

MY THREE PRIORITIES

PRIORITY	WHY IT DESERVES FOCUS	WEEKLY STANDARD / MEASURE
1.		
2.		
3.		

What will I intentionally NOT focus on?

Name the attractive distractions, low-value activities, or strategies you are choosing not to prioritize.

My 1-3-5 Business Plan

One business objective. Three strategic priorities. Five actions for each priority.

1 Business Objective

The primary business result I intend to create in 2027:

3 STRATEGIC PRIORITIES

STRATEGIC PRIORITY 1	STRATEGIC PRIORITY 2	STRATEGIC PRIORITY 3

5 ACTIONS FOR EACH PRIORITY

5 ACTIONS — PRIORITY 1	5 ACTIONS — PRIORITY 2	5 ACTIONS — PRIORITY 3
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	4.
5.	5.	5.

My 2027 Scoreboard

Track enough to diagnose the business — not so much that measurement becomes the work.

METRIC	ANNUAL	MONTHLY	WEEKLY
GCI			
Closed sides			
Listing appointments			
Buyer consultations			
Meaningful real estate conversations			
Business-development blocks completed			
Market knowledge / skill sessions			
My custom metric: _____			

WEEKLY REVIEW QUESTIONS

1. Did I execute the activities I said mattered?

2. Where is the bottleneck: activity, skill, conversion, or follow-up?

3. What will I adjust next week without abandoning the plan?

Build My Model Week

Your calendar is where the business plan becomes real.

SCHEDULE IN THIS ORDER

ORDER	WHAT GOES IN	
1	Personal non-negotiables	Family, health, commitments, days off, and boundaries.
2	Business development	Protect the activities that create future business before the day fills up.
3	Follow-up	Give active opportunities and warm relationships a defined home in the week.
4	Skill + market knowledge	Practice the conversations and knowledge that improve conversion.
5	Client appointment windows	Create predictable windows for consultations, showings, and listing appointments.
6	Administration + flex	Leave room for the real world without sacrificing your highest-value work.

BEFORE YOU DRAW THE SCHEDULE

My non-negotiable personal commitments: _____

My standing office / training commitments: _____

My business-development blocks must total: _____

My preferred client appointment windows: _____

MODEL WEEK RULE

Do not build the perfect week. Build the default week you can return to when real estate gets messy.

Draft 1

Get it out of your head and onto paper. Expect to change it.

	MON	TUE	WED	THU	FRI	SAT	SUN
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7:30 AM							
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Draft 2

Adjust it until the priorities, capacity, and real-world constraints actually fit.

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My 2027 Model Week

This is the default schedule I will return to when the week gets disrupted.

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My 2027 Commitment

Bring the identity, strategy, math, and schedule together on one page.

The business I am building

Describe it in one sentence.

The agent I am becoming

Five words or traits.

My one business objective

The result that matters most.

My three strategic priorities

1. _____ 2. _____ 3. _____

My most important weekly standard

What must happen even when I am busy?

What I will no longer tolerate

The behavior, pattern, or distraction that has to stop.

My first proof action

What will I do immediately that proves I am becoming this person?

I do not have to wait for the results
to become the person capable of producing them.

NAME

DATE

Parking Lot + Follow-Up

Capture ideas without letting them hijack the plan.

Use this page for ideas, questions, people to call, resources to find, or items that deserve attention after the workshop.

Become Unrecognizable

THE STANDARD

Build the agent first. Then build the business.

The plan you just wrote is not the point. The person who executes it is. Return to this workbook every week, measure honestly, adjust without abandoning the plan, and let 2027 be the year the market has to learn your name again.