

ANNUAL BUSINESS PLANNING

2027 Real Estate Business Planning Workbook

Turn 2026 results into a focused plan for the year ahead.

Review 2026 Before You Plan 2027

A stronger plan starts with evidence. Use this page to capture what actually happened in your business before you decide what needs to change.

2026 BUSINESS SNAPSHOT

Closed transaction sides	Gross commission income
Average sales price	Average commission per closing
Best month of the year	Most common challenge I faced

WHAT CREATED BUSINESS?

Estimate the share of your closed business that came from each source. Exact percentages are helpful, but directional estimates are fine.

- | | |
|---|---|
| ☐ Past clients / repeat business | ☐ Referrals |
| ☐ Sphere / database | ☐ Open houses |
| ☐ Online leads | ☐ Social media / content |
| ☐ Prospecting / farming | ☐ Other |

NOTES FROM 2026

What Should You Keep, Change, or Stop?

Patterns matter more than isolated wins or frustrating weeks. Use these prompts to identify what deserves to carry into 2027.

KEEP

What worked well enough to repeat?

Lead sources, follow-up habits, marketing, client experience, routines, partnerships, or systems.

CHANGE

What created friction or inconsistency?

Look for places where good intentions depended too much on memory, urgency, or last-minute effort.

STOP

What took time without creating enough value?

Identify activities, tools, meetings, marketing, or habits that no longer earn their place.

THE BIGGEST LESSON I AM CARRYING INTO 2027

Choose Four Goals That Work Together

A useful plan balances revenue, relationships, systems, and professional growth. Define one priority in each area before adding more goals.

01 REVENUE

What business result would make 2027 successful?

Annual GCI / revenue goal

02 RELATIONSHIPS

What database or client relationship outcome matters most?

Database growth / cleanup goal

03 SYSTEMS

What process needs to become more repeatable?

System or workflow to improve

04 DEVELOPMENT

What capability would make me more effective?

Skill / knowledge priority

Build the Weekly Activity Behind the Goal

A business plan becomes useful when annual goals are translated into behaviors you can schedule, track, and repeat.

PRIMARY BUSINESS-DEVELOPMENT SOURCES

1. _____	Weekly minimum: _____
2. _____	Weekly minimum: _____
3. _____	Weekly minimum: _____

WEEKLY OPERATING STANDARDS

☐ Lead generation / prospecting	My minimum: _____
☐ Database conversations	My minimum: _____
☐ Follow-up blocks	My minimum: _____
☐ Client service / transaction work	My minimum: _____
☐ Marketing / content	My minimum: _____
☐ Professional development	My minimum: _____
☐ Business review / planning	My minimum: _____

KEEP THE STANDARD REALISTIC

Your weekly minimum should be small enough to survive a busy week and meaningful enough to keep the business moving.

Turn the Year Into Four Manageable Quarters

Do not try to execute the entire year in January. Assign a primary focus, action, and measure to each quarter.

QUARTER	PRIORITY	ACTION	MEASURE
Q1			
Q2			
Q3			
Q4			

ONE DECISION I CAN MAKE NOW THAT WILL MAKE Q1 EASIER

Create a Weekly Review Rhythm

Plans drift when they are only reviewed once a year. Choose a simple weekly or monthly rhythm for checking progress and adjusting the plan.

MY BUSINESS REVIEW

Day / time I will review the business

Metrics I will review

Pipeline / follow-up question I will ask

One priority I will choose for the next week

ELEVATE MEMBERSHIP

Need structure to keep working the plan?

Scan the QR code to learn more about Elevate and get ongoing support through practical business development, training, and weekly accountability that helps keep your plan in motion.

pathwaytrainingacademy.com/elevate



Scan to explore Elevate.

FREE COACHING CONSULTATION

Get personalized guidance for your next step.

Scan the QR code to schedule a FREE coaching consultation and get help turning your goals, lead-generation plan, and systems into a practical action plan.

pathwaytrainingacademy.as.me/coaching



Scan to schedule your FREE session.

YOUR FIRST ACTION THIS WEEK
