

2026

BUSINESS PLANNING *Guide*

PRESENTED BY
REALTY**ONE**GROUP

Best practices to build a
sustainable, profitable real
estate business in 2026



ONE

"MAKE YOUR VISION SO CLEAR YOUR FEARS BECOME IRRELEVANT."
– ANONYMOUS

BUSINESS PLANNING

As we look into a new year in an industry that is ever-changing and evolving, it has never been more critical to have a clear vision of what must be done to experience the success you deserve. You are a business owner responsible for building a sustainable and profitable business. The first step is to prepare for amazing results by creating a plan of action inclusive of clear, concise goals in all areas of your life.

Let's get started!
What 3 areas of your business do you want to focus on in 2026?

1.

2.

3.

"Those with clearly written goals accomplish 5 to 10 times more than those without written goals"



The tools provided for you in this 2026 Business Plan allow you to determine the direction in which you want to move your career. You will also clearly state the objectives and activities needed to execute your vision.

- Why Set Goals:**
 - To fuel your ambition
 - To provide a long-term vision
 - To create accountability
 - To track and measure results
- 4 Areas of Goals:**
 1. Business/Career
 2. Family
 3. Spiritual/Personal Development
 4. Health

BEST PRACTICES FOR TOMORROW'S PROFESSIONAL

- Design a plan of action that works for you.
- Create and maintain a daily schedule.
- Review the previous year's business goals and analyze the previous year's results
- Estimate the number of transactions (listings and sales) needed to reach your goals.
 - See “Real Estate Closing Goals Worksheet”
- Consistently prospect
 - See “Real Estate Closing Goals Worksheet” (can be found in ONE.U or email coaching@realtyonegroup.com)
 - Establish a minimum number of prospecting hours relative to your income goal
 - If new to the industry, 95% of your time should be spent finding new business.
- Create a monthly marketing plan
 - Create marketing assets
 - Determine mode of distribution
 - Schedule each activity
- Establish a budget
 - See “Personal/Business Budget Worksheet” (can be found in ONE.U or email coaching@realtyonegroup.com)
 - Set your income and expense Goals to determine your Budget
 - Record your actual income and expenses monthly
- Measure and track transaction results by utilizing zONE (transaction tab) and Skyslope

“VISION WITHOUT ACTION IS MERELY A DREAM. ACTION WITHOUT VISION
JUST PASSES THE TIME. VISION WITH ACTION CAN CHANGE THE WORLD.
– JOEL A. BARKER

2025 A YEAR IN REVIEW

Total Income: _____

Total Cost/Investment of Operations: _____

Listing Appointments: _____ Listings Signed: _____ Listings Sold: _____

Buyer Appointments: _____ Buyers Signed: _____ Buyers Closed: _____



What was my Sales Goal _____ Transaction Goal _____

Did I achieve my Sales goal? (Circle One) Yes/No

Did I achieve my Transaction goal? (Circle One) Yes/No

What did I do well in 2025: _____

WHERE DID MY BUSINESS COME FROM IN 2025?

Utilize the ONE Business Snapshot Worksheet (can be found in ONE.U or email coaching@realtyonegroup.com)

If I could have done ONE thing differently, it would have been:

Biggest Lesson Learned: _____

2026 GOALS

Total Income: _____

Total Cost/Investment of Operations:

of Transactions Closed: _____ Average Sales Price: _____

Fall thru Rate: _____ % (**Pending transactions that do not close**)

of Listings needed: _____ # of Buyers needed: _____

Why is your income goal important to you? What will it bring you/allow you to accomplish?

If you do not hit this goal, who will suffer?

What will be sacrificed if I do not hit my goal?

Is my Goal non-negotiable? (Circle One) Yes/No

Utilize the ONE Business Calculator Worksheet
(can be found in ONE.U or email coaching@realtyonegroup.com)

"IF YOU DON'T KNOW WHERE YOU ARE GOIN', YOU'LL END UP SOMEPLACE ELSE."
– YOGI BERRA

POWER QUESTIONS

3 ways I will increase my revenue in 2026:

1.

2.

3.

3 ways to generate referrals (including allied resources):

1.

2.

3.

3 ways to improve quality of service:

1.

2.

3.

"A GOAL WITHOUT A PLAN IS JUST A WISH."
– ANTOINE DE SAINT-EXUPERY

Greatest Strength:

What makes you unique?

How are you using that in your business?

What do you need the most help with?

What resources do you have for this? (people/things)

Please email coaching@realtyonegroup.com for all interactive Excel worksheets mentioned

in this Business Plan including (can also be found in ONE University:

- Real Estate Closing Goals Worksheet
- Personal/Business Budget Worksheet
- ONE Business Snapshot
- ONE Business Calculator

"GOOD BUSINESS LEADERS CREATE A VISION, ARTICULATE THE VISION,
PASSIONATELY OWN THE VISION, AND RELENTLESSLY DRIVE IT TO COMPLETION."
– JACK WELCH

FOCUSING ON SUCCESS

Break down your goals and tasks for each quarter:

Q1) Goals/Tasks	Q2) Goals/Task
Q3) Goals/Tasks	Q4) Goals/Task

FOCUSING ON SUCCESS

TO ACHIEVE YOUR GOALS:

Poor Habits to Stop: (the Give Up List)