

REALTOR BUSINESS PLAN

*The ultimate plan for
your success in the
Canadian real estate
market*

PROSPECTING

*What is the most
important priority for a
realtor? Prospecting
consistently!*

MY PERSONAL BRAND

*Start thinking about
how you want your
brand to be
represented and seen
by your ideal clients.*

MY LEAD GENERATION

\$AVE MAX 

INTRODUCTION

Dear Team,

I am thrilled to present our realtor business plan—a strategic blueprint that sets the course for our success in the year ahead.

This plan is more than just a document; it embodies our shared vision and commitment to excellence.

As we embark on this journey together, I want to share some key insights to help us fully commit to the plan:

Focus on Clients: Our clients are the heartbeat of our business, and their satisfaction is paramount to our success. Let's go above and beyond to understand their needs, anticipate their desires, and deliver exceptional service that exceeds their expectations at every touchpoint.

Commit to Continuous Learning: The pursuit of knowledge is a never-ending journey, and our commitment to personal and professional development is what sets us apart. Let's invest in ourselves, seek out growth opportunities, learn from both successes and failures and continuously refine our skills to become the best versions of ourselves.

Cultivate a Positive Mindset: Success begins in the mind, and maintaining a positive, resilient mindset is essential to overcoming challenges and achieving our goals. Let's approach each day with optimism, determination, and a steadfast belief in our ability to turn obstacles into opportunities.

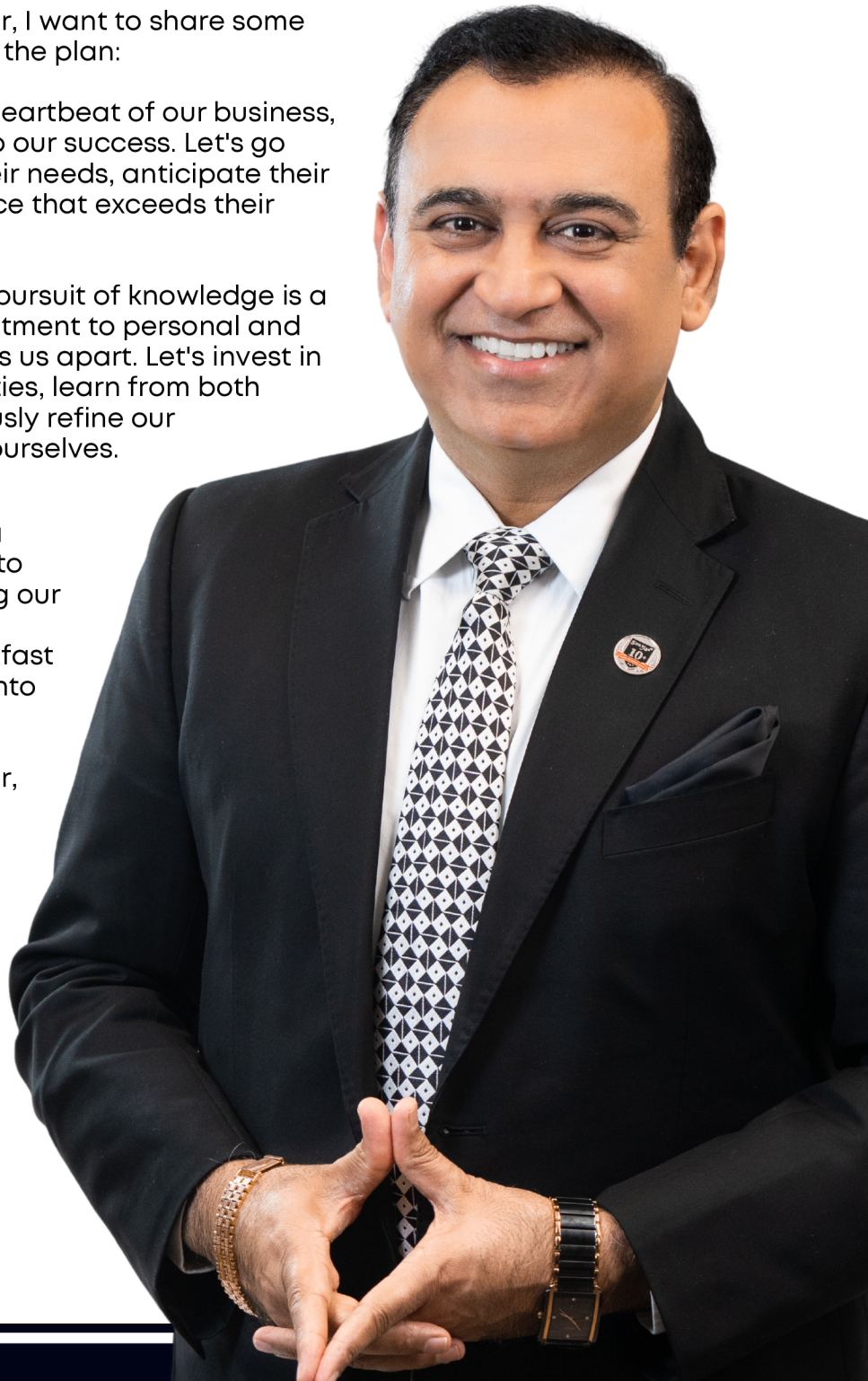
As we embark on this journey together, let's remember that our potential is limitless when we unite behind a common vision and work towards a shared purpose.

Here's to a year filled with growth, prosperity, and boundless achievements!

Warm regards,

Raman Dua.

Raman Dua
Founder & Group CEO



1

MY GOALS

As a realtor, your success isn't just about showing homes or closing deals—it's about having a clear vision and a roadmap to achieve it. Goal setting is the cornerstone of every high-performing real estate professional. It transforms dreams into actionable steps, helps you track progress, and ensures that your energy is directed toward what truly matters.

Without specific and clear goals, you are shooting in the dark trying to improve. Whether you are setting short-term goals (e.g. daily, weekly, monthly) or long-term goals (e.g. quarterly, annually), it is important to keep these goals SMART- Specific, Measurable, Achievable, Relevant, and Time-Bound.

Today is [write the date] and in 12 months my real estate business will look like...

Your Response

- I will be earning _____ In Gross Commissions.
- I will be spending _____ Hours in prospecting daily.
- I will be visiting the brokerage office during the following days:
 - ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday
 - ☐ Saturday ☐ Sunday
- My dedicated workdays are (select your preferred working days)
 - ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday
 - ☐ Saturday ☐ Sunday

2025 TARGETS

Number of leads to be generated	
Number of referrals to be generated	
Number of hours to be dedicated to prospecting	
Average monthly outreach (social media + others)	
Number of leads to be converted	
Average purchase value	
Number of lease transactions	
Number of pre-construction deals closed	
Gross commission earned	

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2

MY NUMBERS

Achieving financial freedom might feel like a daunting task. However, you can secure your financial future as a realtor by considering a few important strategies and tips.

Some goals will take months or years — if not decades — to reach. That's part of the plan! But you also get an immediate payoff: a whole lot less stress starting the minute you start implementing your financial plan.

How much do you want to earn from January – December 2025?

Your Response

Target Number of Leads

Your Response

Target Number of Lease Clients

Your Response

Target Number of Listings & Buying Clients

Your Response

Conversion Rate

Your Response

Percentage to withhold for taxes.

Your Response

3 MY LEAD GENERATION

My Source of Leads

You should have multiple sources of leads. Set yourself SMART targets to generate leads based on the following chart.

Priorities	Targets
Number of Open Houses Attended	
Number of Cold Calls Made	
Number of Contacts Made through the Circle of Influence – Family, Colleagues & Friends	
Number of Door Knocking Completed in Your Farming Area	
Number of Referrals Secured	
Total Number of Social Media Followers	

Prospecting

What is the most important priority for a realtor? Prospecting consistently!

Prospecting is important because it involves:

- Actively seeking out individuals who may be interested in buying, selling, or renting properties.
- Initiating contact with potential clients, start conversations, and build rapport. Building strong relationships can lead to repeat business and referrals.
- Develop a consistent flow of potential deals in your pipeline and ensure a steady income stream.

There are various ways to focus on prospecting as a realtor. The effectiveness of each of these options depends on your personal preference, location, farming area, and target audience. Some of these options include:

- **Referrals:** Referrals from satisfied clients, friends, family members, and professional contacts can be a powerful source of leads. Building strong relationships and providing excellent service can encourage others to refer clients to you. Ask for referrals from your family members and friends consistently.
- **Cold Calling:** The traditional method of cold calling is still common and valued in real estate. You can use the Canada 411 website to reach out to potential clients in your farming area directly via phone calls and introduce yourself and your services. Visit Save Max's Elevate platform and learn more about how you can improve your cold-calling skills.
- **Door Knocking:** High-performing agents across Save Max consistently focus on door-knocking in their farming areas. You can coordinate with your Team Lead and team members to identify a farming area and challenge each other to complete door-knocking while introducing yourself and your services to your potential clients.
- **Expired Listings:** Following up with homeowners whose listings have expired can be an effective way to find motivated sellers who may be open to relisting with a new agent.
- **Open House:** Hosting open houses can provide opportunities to meet potential buyers and sellers face-to-face. It allows you to showcase properties, answer questions, and build relationships with potential clients. At Save Max, every agent has an opportunity to host open houses and increase their client base and business. Speak to our administrative team today to book your next open house!
- **Digital Marketing:** It is extremely important to increase your visibility across social media, websites, and online advertising to help you reach a wider audience. Creating engaging content, participating in online communities, and running targeted ads can attract potential clients.

Prospecting Action Plan

Action	Targets	Frequency	Results
Send personalized messages to your contact list	50	Daily	
Call individuals in your contact list and promote your real estate services and ask for referrals.	50	Daily	
Publish social media posts focusing on three key aspects – education, entertainment, information.	3	Weekly	
Start door knocking either individually or as a team	100	Weekly	
Start an e-mail campaign with a balanced focus on creative and promotional content	3	Weekly	

4

MY PERSONAL BRAND

Personal branding is the key to standing out, building trust, and establishing credibility among your current and potential clients. Start thinking about how you want your brand to be represented and seen by your ideal clients.

Market research

A comprehensive study of your farming area, competition and client needs is a must for gaining valuable insights into your market. These insights will help you identify opportunities for personal branding and ensure that your brand stands out from the competition.

What are the general trends (days on market, typical commissions, average sold price, etc.) in your farming area?

- Days on Market:
- Typical Commission
- Average Sold Price:
- Sales Activity in the area:

What are the new and exciting opportunities in your farming area, such as new projects, pricing changes, new government investments?

- New Projects :
- Pricing Changes:
- New government Investments:

Market saturations (where is there too much and of what?)

Your Response

Local competition (who's your potential competition in your farming area, and what are they doing well; where are they lacking; are there gaps in services?)

- List of local Competitors :
- Competitors' Strengths :
- Competitors' Weaknesses :
- Your difference / Strengths :

What do you learn about your farming area based on the MLS research?

My farming area's main attributes and needs are:

-
-
-

Defining your target audience

An understanding of your ideal clients, what drives their buying or selling behaviour, and what they need and want is essential to creating a brand that truly connects with them. What are their pain points? What can you offer them to address their needs? What makes you unique as a realtor?

Now that you have deep insight into your market and have identified possible niches, consider how you will fill this need and what type of clients you want to target. For example, do you wish to become a pre-construction specialist? Perhaps, a first-time homebuyer agent? How about commercial real estate agent? Focus on your strengths, networks, and interests to select an ideal client base.

What their specific needs and pain points?

My clients specific needs and pain points are:

-
-
-

How can you best market to them?

Your Response

What are their key objections and hesitations?

Your Response

What will you offer them?

Your Response

How is it different from what other realtors are offering?

Your Response

Your Values

Your values are like your personal compass: they represent your choices and behaviors as a real estate agent. Select 3-5 values and include them in your communications and profile pages.

List of Core Values

- Integrity
- Professionalism
- Trustworthiness
- Transparency
- Accountability
- Reliability
- Respectfulness
- Empathy
- Customer service
- Communication
- Collaboration
- Adaptability
- Honesty
- Diligence
- Expertise
- Responsiveness
- Attention to detail
- Ethical behavior
- Confidentiality
- Local knowledge
- Cultural sensitivity
- Community involvement
- Negotiation skills
- Market awareness
- Timeliness
- Problem-solving
- Innovation
- Persistence
- Goal orientation
- Continuous learning

BRAND STYLE

Your brand style should visually represent you. Your visual elements such as logo, colour scheme, and typography, should be memorable and easily recognizable by your target audience. Your visual identity should accurately reflect your brand and differentiate it from others in the market.

What are Save Max's primary and secondary brand colors? Ideally, you will have one primary color and two or more secondary colors to be used as highlighters only.

My Primary color

My Secondary colors are

What fonts or typography you feel best represent your brand? Why?

Sans-serif fonts like Arial and Helvetica are clean and modern, ideal for digital use like websites and emails. Serif fonts such as Times New Roman and Georgia are commonly chosen for print materials like brochures and reports. Slab serif fonts like Rockwell and Courier are bold and eye-catching, often used for headlines and display text.

My primary fonts are

Defining Your Vision and Mission

The mission and vision statement sets the foundation upon which to launch your business. It is difficult to move forward successfully without first defining your business and the ideals under which your business operates.

Your Vision

Why are you in business? Why does your business exist? What do you want your business to look like?

My vision is

Your Mission

My mission is

What's your story?

To stand out in the competitive real estate industry, you will need to write a unique personal profile. Your story should clearly highlight your strengths, passions, life goals, education, professional experience, and volunteer work. Write a story that is engaging, unique, and memorable!

What is your purpose in life?

What are your main passions?

What are your academic qualifications? Any major certification or educational achievement?

What can you share with your clients about your professional experience?

TIE IT ALL TOGETHER!

Write a brief story or biography that you could publish on your social media platforms under “About Me” Section.

Your Elevator Pitch

An elevator pitch is a roughly 30-second way of introducing yourself, what you do, and establishing a connection with someone. It's called an elevator pitch because it takes nearly the same amount of time to ride an elevator with someone and have a brief conversation with them.

Start by introducing yourself

My name is...

What do you do?

I am a real estate agent specializing in

What is your ask?

Your Response

HOW TO WRITE AN ELEVATOR PITCH



An elevator pitch is a concise speech used to sell yourself, your product, or your company in 60 seconds or less - or the time it takes to travel to your floor in an elevator

1



Introduce yourself

Before you start your pitch, you should introduce yourself to your new connection, interviewer, etc. Smile, tell them your name.

2



Explain what you do and what makes you unique

Your USP (or "unique selling proposition") is the one thing that will make you stand out from the crowd in the employment market.

3



Tell them what you want

you need to tell your audience why they make you a good fit for this job role or why you're a useful contact for them

4



Add in a call to action

Your pitch needs to have a strong ending. To ensure you succeed in getting what you want, close your pitch by asking for what you went in for.

5



Practice, edit, and practice again

A great way to practice your pitch is to repeat it to yourself, then record it and play it back. It will help identify any repeated words or weak sentences.

5 MY MARKETING PLAN

You may wish to create a marketing plan as either a section of your business plan or as an addendum. The pillars of your marketing plan should focus on product, price, place and promotion.

Element	Your Response	Notes & Actions
What is your product or service? Be specific.		
How and where will you promote your services?		
What types of promotions will you advertise?		

Element	Your Response	Notes & Actions
How will you ask clients for referrals?		
Which channels will you use to place your marketing message?		
How much time will you be spending per day on your business marketing?		

Lead Generation Goal by Month for the Year 2025

January	May	September
February	June	October
March,	July	November
April	August	December

Brand Awareness Goal by Month for the Year 2025

January	May	September
February	June	October
March,	July	November
April	August	December

Personal or Team Website Traffic Target

January	May	September
February	June	October
March,	July	November
April	August	December

Social Media Visibility and Engagement Goal by Month for the Year 2025

January	May	September
February	June	October
March,	July	November
April	August	December

Video Content

Great personal brands use video content in social media because it effectively communicates their message in a visually engaging format. It helps you to promote your personal brand, connect with more clients, and generate leads and sales.

Video Content	Script & Plan
1. Element	
2.	
3.	
4.	
5.	

Social Media Advertising

Want to boost your real estate business? Try social media ads! They're a game-changer for reaching new clients. ***The most important purpose of social media advertising must be achieving three objectives – lead generation, lead nurturing, and lead conversion.*** Create eye-catching visuals and compelling messages to showcase your listings and expertise. Target specific demographics and locations to maximize your impact. Save Max's Marketing team can offer you the required technical and analytical support to ensure your advertising is effective and successful

Content Type	Budget Spent	Leads Generated	Leads Converted

30-Day Real estate

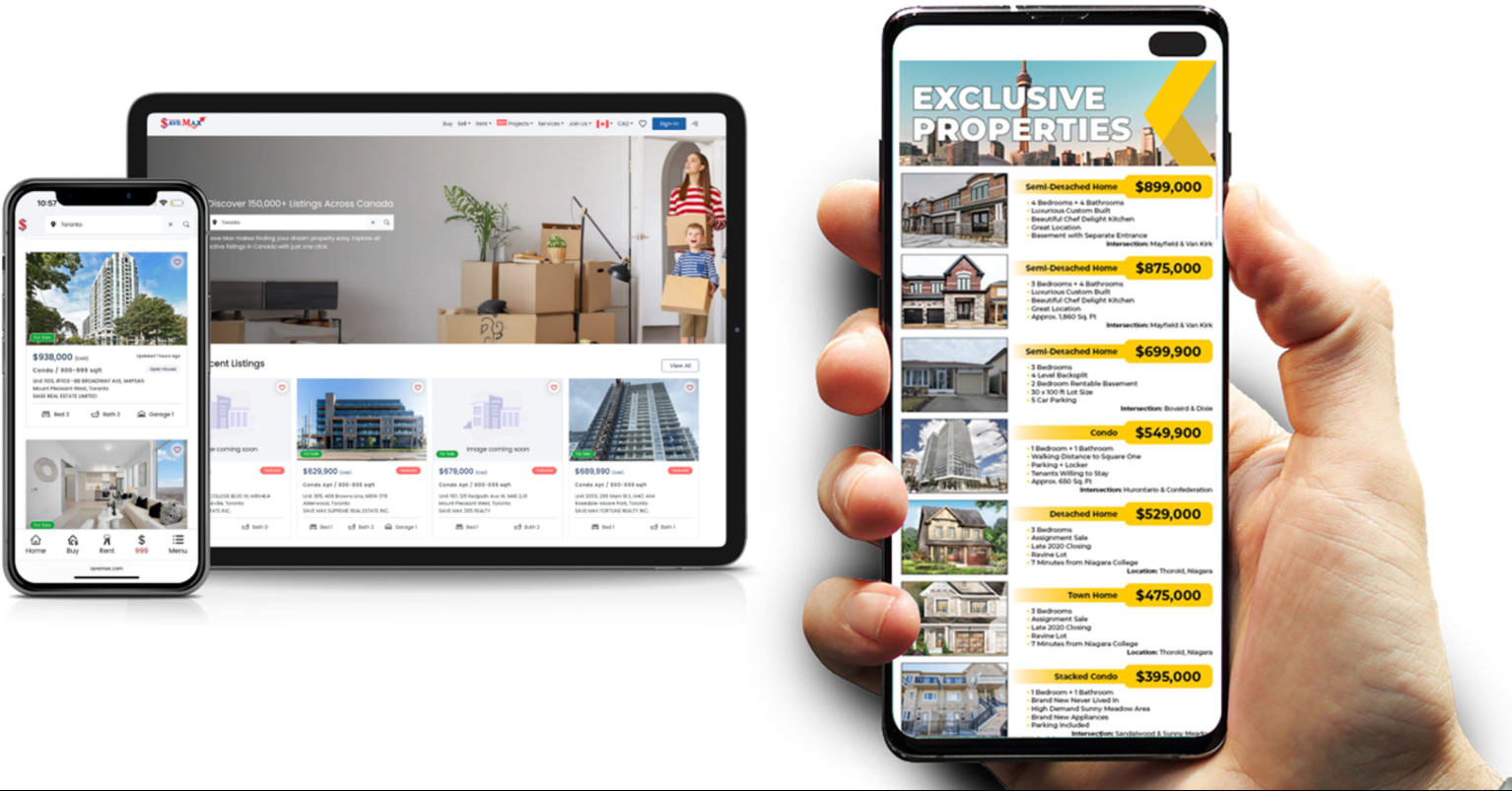
SOCIAL MEDIA CONTENT

1. I'm grateful for.
2. My workspace
3. Family portrait
4. Quarantine outfit
5. Favorite snack
6. Favorite local business
7. A furry friend
8. Blast from the past
9. My first client
10. Local market update
11. Something silly
12. Local news story
13. What I'm working on
14. A good read
15. Favorite local charity
16. Ask a question
17. Why real estate?
18. My neighborhood
19. Client spotlight
20. Did you know?
21. I'm never without...
22. A favorite recipe
23. Quarantine project
24. Dream home
25. Favorite local event
26. My headshot
27. Real estate role model
28. Favorite routine
29. Favorite closing memory
30. I'm looking forward to...

E-Mail Campaign

Want to stand out as a realtor? Email campaigns are your secret weapon! Craft catchy subject lines, share valuable content like property listings and market insights, and personalize messages to make clients feel special. Don't forget to track your results and tweak your approach based on what works best. With email campaigns, you can engage clients, drive traffic, and close deals like a pro!

E-Mail Campaigns	Open Rate	Leads Generated	Cost Per Lead



Drip Campaigns

A drip campaign is like planting seeds for future success in your real estate business. Here's how it works: You set up a series of automated emails that "drip" out to your clients over time, like sending one every few days or weeks. Each email offers something valuable, whether it's tips for buying or selling, local market updates, or featured listings.

Drip Campaign – First Month
Drip Campaign – Second Month
Drip Campaign – Third Month

Virtual and In-Person Events

Get involved by sponsoring local gatherings, hosting community workshops, or participating in charity drives. It's a chance to show your support for the community while also networking with potential clients in your own farming area. Plus, it helps build trust and credibility, showing that you're not just about sales, but genuinely care about the area. So, roll up your sleeves, get out there, and make a difference while growing your business!

Event Type	Purpose	Leads Generated
Event Number 1		
Event Number 2		
Event Number 3		



MY LEARNING & GROWTH

What do you want to learn more about in real estate to get better at your job? How will you make time to learn new things for your real estate career in the future?

To become successful as a high performing realtor, you must commit to a customized learning and development plan for yourself and your team. The following ideas can give you the necessary direction and motivation to learn and grow!

Skills that I must learn and develop in 2025

You can include important skills such as handling objections, social media, video editing, rapport building, technology, etc. depending on your own learning assessment.

Skill 1

Skill 2

Skill 3

Skill 4

Skill 5

Top 5 business and personal growth books to read

Some of the most popular books for realtors to read include how to win friends and influence people; the infinite game; think and grow rich; rich dad, poor dad. What are your favorite books to read in 2025? List them above and commit to reading, listening or watching the related videos.

Book 1

Book 2

Book 3

Book 4

Book 5

Top 5 Platforms to guide your learning

Where will you find the resources to learn and grow as an individual and as a successful realtor? You can find some great learning materials on platforms such as LinkedIn Learning, TED, Coursera, Save Max's Elevate, our Learning Management System, and podcasts focusing on real estate education.

Platform 1

Platform 2

Platform 3

Platform 4

Platform 5

[illegible]



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