Yearly Planning

The Yearly planning section is where I pause, reflect, and reset. Once a year, I take a high-level look at my business—what worked, what didn’t, and where I’m headed next. This isn’t about setting vague resolutions; it’s about making data-driven decisions, refining my business plan, and setting clear, actionable goals. With the help of accountability partners, mastermind groups, and honest self-review, I align my systems and mindset for long-term growth. The work I do here sets the tone for everything that follows—because a powerful year starts with a powerful plan.

- Yearly Planning
- Business Plan

Yearly Planning

Yearly Tasks SOP: Reflect, Refocus, and Realign

Objective

To intentionally review the past year, refine my business plan, and reset clear, measurable goals that align with my long-term vision. This process is about reflection, accountability, and building a roadmap for consistent growth.

Timing – Completed annually in December or early January. Block a full day or two half-days in your calendar and treat this as a non-negotiable CEO-level meeting with yourself.

Year-End Business Review

Total GCI and number of deals closed. Source of business breakdown (sphere, online, referrals, farming, etc.). Average commission per deal. Total expenses and ROI by category (ads, signs, tools, CRM, etc.). Wins, lessons, and bottlenecks from the year.

Annual Goal-Setting Process

Set goals for: Gross Commission Income (GCI), number of transactions, lead generation (daily/weekly metrics), listings taken vs. sold, and marketing efforts (videos, emails, newsletters). Identify your Big Why for the year. Break annual goals into quarterly milestones and monthly benchmarks.

Business Plan Refresh

Update or adjust your business plan based on performance. Re-define your core marketing pillars (sphere, farming, online, etc.). Reassess niche or target market based on results. Add new systems

or tools if needed. Remove or improve anything that caused friction last year.

Yearly Accountability

Choose or recommit to an accountability partner. Meet weekly or bi-weekly to review progress and commitments. Join or organize a mastermind group and meet monthly or quarterly to share ideas, wins, and challenges. Track your goals with a visible dashboard, planner, or app. Keep a “Win Log” to reflect on progress throughout the year.

Strategic Vision Session

Reflect on where you want your business to be in 1, 3, and 5 years. Ask: What kind of clients do I want to serve? What kind of lifestyle do I want to create? Make sure your daily and weekly actions align with that long-term vision.

Business Plan

You can access an editable version of your business plan here -

Business Plan PDF