The Perfect
for you
REAL ESTATE BUSINESS

SAMPLE DELIVERABLE · C1 PERSONAL BUSINESS PLAN BUILD

Jerod Lee — Personal Business Plan

Six-month horizon · Treasure Valley, Idaho



PREPARED BY

Jerod Lee

The Perfect Real Estate Business

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1. Fit summary

Who this plan is for. Jerod Lee, Associate Broker, licensed in Idaho since 2005, leading a specialist team in the Treasure Valley. Background in architectural design and civil engineering — reads plans and builder specifications the way a designer does. Certified Luxury Home Marketing Specialist (CLHMS).

Sample prepared on Jerod Lee's own practice to show the shape of the work. Figures shown as ranges or marked illustrative.

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The eight dimensions, as answered at discovery

Dimension	Answer	What it means for the plan
Experience	21+ years licensed; design and engineering before that; team leader	Authority content and builder relationships are natural lanes; cold prospecting is a poor use of the asset
Wiring	Comfortable on camera and in rooms; prefers depth over volume; builds systems	Content and seminar lanes over door-knocking; structure over improvisation
Lifestyle	Full-time; evenings for team and training; weekends partly open	Lanes must run on a weekly rhythm, not daily cold hours
Budget	Band: $500–1,500 / month	Enough for production and tools; not enough for paid portals at scale
Runway	Band: 6+ months	Long-horizon lanes are affordable
Target	[band — stated at discovery]	Two lanes, not four
Database	Band: 300+ contacts; past clients 50+	Database activation is the fastest lane available
Market	Boise–Eagle–Meridian; luxury and new construction; builder-heavy	Builder partnerships and luxury authority are the market's gift

The two lanes

- **Lane one (next 90 days) — Database and client events.** 300+ contacts who already know the name. The quickest path to listing appointments is a reason to call them and a reason for them to call back.
- **Lane two (next three years) — Content and local search.** The show, the site network, Google Business Profile and reviews. Slow to build, compounding, and it fits how Jerod is wired.

What we are not doing. Paid portals, cold calling, door-knocking, mass mail. Not because they don't work — because they don't fit this agent, and the budget band doesn't carry them.

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2. Purpose

Why this business exists in one paragraph, in the agent's words.

Jerod supplies at discovery

["Every client deserves an agent who specializes in their exact situation. I build the team that makes that true in the Treasure Valley, and I lead the luxury and new-construction practice myself."]

3. The 3-1-90 grid

Three priorities and one keystone project for the next 90 days. The grid repeats every quarter.

	Priority	Measure
1	Reactivate the database — every past client contacted personally	Contacts made / week
2	One client event on the calendar with a date and a venue	Event booked by day 30
3	Weekly content cadence held — one episode, two reels	Published on schedule, 12 of 13 weeks
Keystone	The luxury pre-listing kit live and in the hands of every seller prospect	Kit delivered to [n] prospects by day 90

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4. Daily-number math

figures illustrative

The method, shown with round numbers so the arithmetic is visible. The agent's real inputs replace them at delivery.

Closings wanted in six months: **[target band]** → illustrated here as 6

Appointments per closing (agent's history): ~3 → 18 appointments

Conversations per appointment: ~8 → 144 conversations

Working weeks in six months: 24 → **6 conversations a week, about 1 a day**

That is the daily number. Everything in Lane one exists to produce it.

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5. Six-month scorecard

Month	Lane one	Lane two	Keystone	Check-in
1	List built, first 60 contacts	Episode cadence confirmed	Kit content locked	Walkthrough
2	Event date set; 60 more contacts	Reels cadence held	Kit printed	30-day call
3	Event held	GBP posts weekly	Kit in prospects' hands	Quarter review; new 3-1-90
4	Follow-up on event leads	Review requests systemized	Second keystone chosen	—
5	Second touch on whole list	First local-search ranking check	—	—
6	Appointments vs. plan	Content vs. plan	Keystone vs. plan	Six-month review

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6. Marketing budget

bands

Line	Band	Lane
Production (video, audio, editing)	$300–600 / mo	Two
Client event	$500–1,500 one-time	One
Print (kit, cards, leave-behinds)	$100–300 / mo	One + keystone
Tools (CRM, hosting, scheduling)	$100–250 / mo	Both
Total	**within the $500–1,500 / mo band**	

7. Accountability cadence

- Weekly: 15-minute scorecard check-in (text or email) — the daily number, the lane task, the one blocker.
- Monthly: the budget line against results.
- Day 30: check-in call. Day 90: quarter review and the next 3-1-90.
- Who holds the agent to it: Jerod Lee, The Perfect Real Estate Business. For PREB Coaching clients, this cadence is months two through six.

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