

## PLAN™ – priority leadership action navigators

|                               |       |
|-------------------------------|-------|
| agency name:                  | _____ |
| business owner:               | _____ |
| business address:             | _____ |
| business owner email:         | _____ |
| business owner direct phone:  | _____ |
| business owner mobile number: | _____ |
| iiCC:                         | _____ |
| PLAN™ date:                   | _____ |

### PLAN™ – objectives

Once goals are set, you must then understand what leadership decisions need to be made. PLAN™ assists you, the property management business owner, with planning necessary leadership actions in order to achieve your 12-month FOCUS™ goals. Your PLAN™ can be reviewed every few months to help you stay focused on your business goals.

### about the business component questions

Please complete the following business component questions. On each business component mark your goal for the next 12-month period, as per your FOCUS™

#### Rating scale:

- 1      **Very bad**
- 2      **Bad**
- 3      **Very poor**
- 4      **Poor**
- 5      **Somewhat satisfactory**
- 6      **Satisfactory**
- 7      **Good**
- 8      **Very good**
- 9      **Excellent**
- 10     **Phenomenal**

## business components

Please mark on each business component your goal for the next 12-month period, as per your FOCUS™:

### efficiency

|   |   |   |   |   |   |   |   |   |    |
|---|---|---|---|---|---|---|---|---|----|
|   |   |   |   |   |   |   |   |   |    |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

What changes do I need to make, and by what date, to achieve increased efficiency?

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### productivity

|   |   |   |   |   |   |   |   |   |    |
|---|---|---|---|---|---|---|---|---|----|
|   |   |   |   |   |   |   |   |   |    |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

What changes do I need to make, and by what date, to achieve improved productivity?

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### profitability

|   |   |   |   |   |   |   |   |   |    |
|---|---|---|---|---|---|---|---|---|----|
|   |   |   |   |   |   |   |   |   |    |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

What changes do I need to make, and by what date, to achieve increased profitability?

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## consistency

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1 2 3 4 5 6 7 8 9 10

What changes do I need to make, and by what date, to ensure consistency in service and processes?

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## culture

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1 2 3 4 5 6 7 8 9 10

What changes do I need to make, and by what date, to improve my business' culture?

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## client retention

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1 2 3 4 5 6 7 8 9 10

What changes do I need to make, and by what date, to improve client retention?

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### client repeat business



What changes do I need to make, and by what date, to achieve client repeat business?

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### team morale



What changes do I need to make, and by what date, to improve team morale?

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### team retention



What changes do I need to make, and by what date, to improve team retention?

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### team knowledge



What changes do I need to make, and by what date, to improve team knowledge?

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### team salary costs



What changes do I need to make, and by what date, to improve team salary costs?

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### property management income



What changes do I need to make, and by what date, to increase and optimize my property management income?

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## business growth

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|---|---|---|---|---|---|---|---|---|----|
|   |   |   |   |   |   |   |   |   |    |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

What changes do I need to make, and by what date, to stabilize and grow my property management business, market share, brand and reputation?

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## signed:

Business owner: \_\_\_\_\_ Date: \_\_\_\_\_

iiCC: \_\_\_\_\_ Date: \_\_\_\_\_