



Building Your Business Plan with AI

From a Blank Page to One Page



Most Business Plans Never Get Written

The Blank Page Wins Most Years

- Most agents mean to start
- Few ever finish a draft
- Fewer still open it again
- The blank page usually wins



The Momentum Plan

One Goal, Three Focus Areas, Five Actions



Meet the Example

A Newly Licensed Agent, Real Situation

- Newly licensed, no track record yet
- Career changer, built-in existing network
- Leads with sphere of influence



Building the Plan with Claude Cowork

The Math Behind It

Goal, Transactions, Conversations Per Week



- Annual goal sets the target
- That sets transactions needed
- That sets weekly conversations needed
- No math, no real plan

Thank You

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