

The Momentum Plan — Worksheet

One mission. One goal. Three focus areas. Five actions each.

Use this form with the companion prompt document from the Building Your Business Plan with AI session, swapping in your own city, background, and goal number. Use the space below to capture what comes back or build it yourself from scratch.

MY MISSION

Mission:

Value Proposition:

MY ANNUAL GOAL

Reverse-engineer your income goal into a transaction count, then into a weekly conversation target you can realistically hit.

Income Goal: \$

Avg. Commission/Deal: \$

Transactions Needed:

Conversations/Week:

MY THREE FOCUS AREAS · five actions each

SPHERE OF INFLUENCE	OPEN HOUSES	DIGITAL / SOCIAL MEDIA
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	4.
5.	5.	5.

STARTUP BUDGET · Year 1 estimates

Licensing & MLS: \$

Lockbox/Signage: \$

CRM & Mktg Tech: \$

Total Needed: \$

A plan without a budget is a guess. A plan with one is a business.

This form is an illustrative example only, not guaranteed income or results. Build your plan around your own numbers and treat AI-generated output as a draft to review, not financial or legal advice.