



Wholesaler Business Plan Template

*“Good fortune is what happens when opportunity meets with planning.”
~Thomas Alva Edison*

Since 2009, Wholesaler Masterminds® has provided our wholesaling community with this *Wholesaler Business Plan Template*.

It’s the same one that I have used to raise billions of dollars.

Over the years we have developed an insane number of resources to assist you:

- Over **600 [blog posts](#)**
- **[The NEW Wholesaler Masterminds Radio Show](#)** podcast or our **[original show archives](#)**, totaling over 250 shows
- Our **[Brotherhood of the Bag](#)** books

If you have questions about any of the components of the business plan, please email me at info@wholesalermasterminds.com.

To your success,

Rob Shore
CEO/Founder
Wholesaler Masterminds®
shorespeak, L.L.C.



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External Wholesaler:	
Internal Wholesaler:	
Territory Name:	



Section 1: Situation Analysis and Assumptions

Situation Analysis

Describe the current business environment within your territory from both a qualitative and quantitative standpoint.

Number of Available Advisors:	
Number of Producing Advisors:	
Total Year-to-Date Production:	
Average Year-to-Date Production per Month:	
Number of Firms with Selling Agreements:	



Assumptions

Describe each account's current status to include management issues (internal), product issues/opportunities, competitive issues, etc.



Section 2: Sales Goals

Sales Goals by Territory

Territory Sales Goals:

Sales Goals by Product

Product Category	Annual Goal (\$)

Sales Goals by Firm

 **Read: [5 Critical Strategies: COIs Will Love You](#)**

Firm	P/Y Year (\$)	C/Y Goal (\$)
Total		

Sales Goals by Month/Quarter

	Jan (\$)	Feb (\$)	Mar (\$)	Q1 Total
Projected				
Actual				
	Apr (\$)	May (\$)	Jun (\$)	Q2 Total
Projected				
Actual				

Mid-Year Projected:

Mid-Year Actual:

Top 100 Focus Advisors (cont.)

Advisor	Firm	P/Y Actual (\$)	C/Y Goal (\$)



Section 3: Top 50 Prospect List

Top 50 Prospects

The following 50 Advisors do not do business with you currently but do significant business in your territory. How will you convert these individuals into producers?

 **Read:** [12 Traits: Your Preferred Advisor](#)

Advisor	Firm	City/State	Strategy



Section 4: Strategies and Rationale

External Wholesaler

Describe the Strategies you will employ in order to achieve your sales goals. **BE SPECIFIC.**
 Please provide both the Rationale for each Strategy as well as the Tactics you plan to undertake.

Strategy:	
Rationale:	
Tactics:	
Strategy:	
Rationale:	
Tactics:	
Strategy:	
Rationale:	
Tactics:	
Strategy:	
Rationale:	
Tactics:	

Internal Wholesaler

Describe the specific strategies you will employ working with your internal to achieve the stated territory goals. **BE SPECIFIC.** Please provide the Rationale and Tactics for each Strategy.

 **Read:** [14 Guaranteed Ways to Achieve Success with Your Internal Wholesaler](#)

Strategy:	
Rationale:	
Tactics:	
Strategy:	
Rationale:	
Tactics:	
Strategy:	
Rationale:	
Tactics:	



**The New
 Wholesaler
 Masterminds
 Radio Show**





Section 5: Weekly Activity Objectives

Weekly Activity Objectives

The following is the average weekly activity projected for your territory.

Activity	Number per WEEK
In-Person One-on-One Meetings:	
In-Person Branch Sales Meetings:	
Zoom/GoToMeeting/WebEx Meetings:	
Public Seminars (In-Person or Virtual):	
Branch Conference Calls/Webinars:	
Targeted Email and/or Snail Mail)	



Section 6: Obstacles and Contingency Plans

Obstacles and Contingency Plans

How will a recession impact your ability to meet your sales goals? What contingency plans have you implemented? What's other obstacles may impact your business?

BE SPECIFIC

Obstacle:	
Contingency Plan:	

Obstacles and Contingency Plans (cont.)

Obstacle:	
Contingency Plan:	
Obstacle:	
Contingency Plan:	
Obstacle:	
Contingency Plan:	



Section 7: Call Rotation

Call Rotation

List the cities you will travel during each week of the rotation. Space is provided for an eight-week rotation, however, the size of your geographic area may dictate a longer (8 week) or shorter (4 week) rotation.

 **Read:** [Do You Get Dirty in Your Territory's Data?](#)

 **Watch:** [Free and Fast Way for Wholesalers to Map Advisor Locations](#)

Week 1:	
Week 2:	

Call Rotation (cont.)

Week 3:	
Week 4:	
Week 5:	
Week 6:	
Week 7:	
Week 8:	



Section 8: Personal and Professional Development Goals

Goals

List 10 goals, both personal and professional that you have for the year ahead. Make certain that the goals you set are S.M.A.R.T.

- S**pecific
- M**easurable
- A**ttainable
- R**ealistic
- T**ime Bound

For more information about S.M.A.R.T. goals read [Wholesaler S.M.A.R.T. Goal Setting](#)

Goals (cont)

Goal 1:	
Goal 2:	
Goal 3:	
Goal 4:	
Goal 5:	
Goal 6:	
Goal 7:	
Goal 8:	
Goal 9:	
Goal 10:	



Section 9: Budget

Annual Budget

What methods will you employ to stay within the allotted budgets?

 **Read:** [5 Rules for Wholesaler Gifting: The Sea of Sameness](#)

 **Read:** [The Only Three Things A Wholesaler Has To Offer](#)

Travel (\$):	
Comments:	

Entertainment (\$):	
Comments:	

Premiums (\$):	
Comments:	



Section 10: Divisional or National Sales Manager

Divisional or National Sales Manager

What support would you like to receive from and how does your manager best create value for your region?

 [7 Essential Wholesaling Skills Your Manager Wants You to Have](#)



Section 11: Technology Utilization

Technology Skills

Describe your level of proficiency and address any additional training needs for the following areas of technology.

 [33 Technology Ideas For Wholesalers To Use](#)

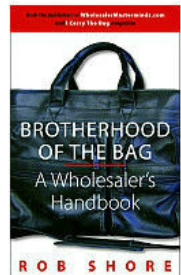
Zoom/GoToMeeting/ WebEx etc.	
CRM (Salesforce, etc)	
iPad/Smart Phone	
Social Media (LinkedIn, etc)	
AI (ChatGPT, Dall-E etc.)	



*"Great Read!
 I'd consider Brotherhood of the Bag a must read
 for any wholesaler looking to improve their practice."*

Jim Ruff
 President- Retired
 OppenheimerFunds Distributors, Inc.

see what's inside at Amazon.com





Section 12: PVP – Peerless Value Proposition®

Peerless Value Proposition

What separates you from the sea of wholesaling sameness?

Know this: It's not your product and it's not your service.

It's that extra added 'something' that we called your PVP – Peerless Value Proposition®

 **Watch:** [Why Wholesalers Need A Great PVP-Peerless Value Proposition®](#)

List your five most compelling attributes – these are generally the things that you suggest advisors will find most valuable in developing a relationship with you. Examples include your ability to speak to public customers, train staff members, or craft complex case solutions.

Not sure what a PVP should be?

 **VIDEO:** [How Wholesalers Create Their PVP-Peerless Value Proposition®](#)