



2024 Wholesaler Business Plan Template

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

For over a decade, 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.

This plan is just part of the success equation. **The very best leaders, athletes, and corporate rainmakers have engaged coaches...and you should too.** To get information about coaching visit this link: [Wholesaler Masterminds Coaching](#).

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
- Expert scheduling assistance through [Wholesaler Masterminds Schedulers](#)
- Our weekly [Sunday Night Email](#) (read by over 10,000 wholesalers around the world!)

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

To your success,

Rob Shore
CEO/Founder
Wholesaler Masterminds®
888-508-5010



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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:	



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Assumptions

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



Section 2: 2024 Sales Goals

Sales Goals by Territory

2024 Territory Sales Goals:

Sales Goals by Product

Product Category	2024 Goal (\$)

Sales Goals by Firm

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

Firm	2023 Actual (\$)	2024 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:

Sales Goals by Month/Quarter (cont)

	Jul (\$)	Aug (\$)	Sep (\$)	Q3 Total
Projected				
Actual				
	Oct (\$)	Nov (\$)	Dec (\$)	Q4 Total
Projected				
Actual				

2024 Projected:

2024 Actual:

Top 100 Focus Advisors

 **Read:** [31 Things Your Toughest Territory Competitor Won't Tell You](#)

Advisor	Firm	2023 Actual (\$)	2024Goal (\$)

Top 100 Focus Advisors (cont.)

Advisor	Firm	2023 Actual (\$)	2024 Goal (\$)

Top 100 Focus Advisors (cont.)

Advisor	Firm	2023 Actual (\$)	2024 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. Your objective is to convert these individuals into producers in 2024.

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

Advisor	Firm	City/State	Strategy

Top 50 Prospects (cont.)

Advisor	Firm	City/State	Strategy

Top 50 Prospects (cont.)

Advisor	Firm	City/State	Strategy



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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:	



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Section 5: Weekly Activity Objectives

Weekly Activity Objectives

The following is the average weekly activity projected for your territory in 2024.

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 in 2024?

BE SPECIFIC

Obstacle:	
Contingency Plan:	



**the missing piece
to your best
success?**

**WHOLESALE MASTERMINDS
SCHEDULERS**

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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.

Download the [Rotation Builder Spreadsheet](#) to optimize your rotations!!!

 **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

2024 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:	

Want to do a better job of tracking your spending and staying on budget?

Pick up the exclusive [Wholesaler Masterminds® Expense Tracker](#)



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)	
Web 2.0 (using RSS technology, cloud based solutions, 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®](#)