



Curiosity x [Competence + Congruence + Connection] = **CONFIDENCE**

One thing I will bring with me into the next 90 days? _____

One thing I stop doing now? _____

90 Day GCI Goal _____ **90 Day** Units Goal _____ **Year-End** GCI Goal _____

% of Listings _____ % of Buyers _____

Check 1-3 items from each category below to implement in the next 90 days and star the items you have already mastered.

COMPETENCE

Click once for ✓ and twice for ★.

- ☐ Study the market for one-hour weekly
- ☐ Weekly office meetings & training opportunities
- ☐ Knowing your #'s: use of stats to show the story
- ☐ Accountability/collab with peers
- ☐ Hire a coach
- ☐ Clean database 1 hour weekly
- ☐ CMA builder / tool - Moxi Present
- ☐ Windermere Bridge Loan
- ☐ Windermere Ready
- ☐ Listen to a book or podcast daily
- ☐ Open house prep
- ☐ Tour weekly
- ☐ Windermere U orientation
- ☐ Other: _____

I know what to do and how to add value here (or I believe in my ability to figure things out and I'm willing to go for it).

SELF-ASSESS 1-10 _____ (10 highest)

CONGRUENCE

Click once for ✓ and twice for ★.

- ☐ Review goals and plan 1 hour weekly
- ☐ Consistent morning &/or evening routine
- ☐ Review web/online presence
- ☐ Track & review hot/warm list daily
- ☐ Add _____ people to database each week
- ☐ Review life list
- ☐ Consistent time blocking / time mgmt
- ☐ Tracking FLOW: weekly activities
- ☐ Review monthly marketing plan
- ☐ Review Buyer Packets
- ☐ Review Seller Packets
- ☐ Review Vendor List
- ☐ Ask for reviews
- ☐ Exercise _____ x per week
- ☐ _____ minute phone-free each evening
- ☐ Focus on transitions throughout the day
- ☐ Learning focused: read daily, listen to a book daily or podcast daily
- ☐ Windermere U 28-day challenge
- ☐ Other: _____

I know I'm living in alignment with the person I am and becoming.

SELF-ASSESS 1-10 _____ (10 highest)

CONNECTION

Click once for ✓ and twice for ★.

- ☐ 20 "LIVE" live contacts per week
- ☐ Deliver _____ unsolicited CMAs
- ☐ Weekly real estate reviews
- ☐ Make post-closing calls per week
- ☐ Make _____ birthday / congrats / "just thinking about you" calls per week
- ☐ Make _____ "the house down the street calls" per week
- ☐ Visit _____ clients per week (pop by's)
- ☐ Have _____ client coffees / lunch per week
- ☐ Make _____ social posts per week - be you!
- ☐ Host _____ open houses per week
- ☐ Write _____ personal notes each week
- ☐ Deliver monthly digital Newsletter
- ☐ Add _____ people to Market Pulse
- ☐ First Look Tour/Preview touring
- ☐ Just Listed / Sold Campaign
- ☐ Print Marketing Campaign
- ☐ 8x8 Campaign
- ☐ Attend _____ networking groups
- ☐ Host client event(s)
- ☐ Volunteer @ _____
- ☐ Other: _____

I know I do well with others, because I'm genuinely interested in learning about them and helping them.

SELF-ASSESS 1-10 _____ (10 highest)

Helpful prompts towards achieving the above areas of focus:

3 skills to develop for greater confidence: _____

Simple steps to gain these 3 skills: _____

Coaches, mentors or peers who can help: _____

powered by



SIGNATURE: _____

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