



“Luck is what happens when preparation meets opportunity”

- Unknown, (Laura just likes this a lot)

Opportunity & Commitment



VITAL SIGNS A QUICK REVIEW OF 2026

Gross Income YTD	2025 GCI Goal	Total Transactions YTD	% of Listings _____ vs. % of Buyers _____	Average Price Point _____
_____	_____	_____		

Number of people in database: Number of touches per month: Primary source of business:

Biggest win in **2025**: _____

2026 KEY OBJECTIVES

2026 GCI Goal	Total Transactions Goal	% of Listings _____ vs. % of Buyers _____	Average Price Point Goal _____
_____	_____		

Does the size of your database align with your goal? **YES / NOT YET**

CIRCLE the tools you want to implement, **CHECK** the items you want to improve, and **STAR** the items you have mastered.

- | | | |
|--------------------------------------|--|--|
| Organized Sphere/Database | <input type="checkbox"/> Monthly WeConnect Newsletter | <input type="checkbox"/> Knowing your Numbers: Use of Stats |
| 20 "LIVE" Contacts weekly | <input type="checkbox"/> Market Pulse | <input type="checkbox"/> Bridge Loan |
| Tracking Warm & Hot List | <input type="checkbox"/> Moxi Present | <input type="checkbox"/> Windermere Ready |
| Consistent Time Blocking /Management | <input type="checkbox"/> Cloze | <input type="checkbox"/> Open House prep |
| Tracking FLOW: weekly activities | <input type="checkbox"/> Office Meetings | <input type="checkbox"/> Buyer Packets |
| Consistent Morning Routine Weekly | <input type="checkbox"/> Just Listed/Sold Campaign | <input type="checkbox"/> Seller Packets |
| Personal Notes | <input type="checkbox"/> Print Marketing | <input type="checkbox"/> Ask for Reviews |
| Real Estate Reviews | <input type="checkbox"/> First Look Tour/Preview touring | <input type="checkbox"/> Scheduled Post Closing Calls |
| Monthly Marketing Plan | <input type="checkbox"/> Birthday/Anniversary Campaign | <input type="checkbox"/> Host Client Events |
| Authentic Social Media Effort | <input type="checkbox"/> Website/Online Presence | <input type="checkbox"/> One-on-One or Group Coaching |
| Post/use of Social Media Offerings | | <input type="checkbox"/> Accountability/Collaboration with Peers |
| | | <input type="checkbox"/> Life List |
| | | <input type="checkbox"/> Custom Vendor List |

Is there anything specific that would keep you from hitting your goal(s)? _____

What 1-3 thing(s) will you stop doing in 2026? _____

Score yourself on a scale of 1 to 5 on the following skills:

- ____ Logistics (i.e. MLS searches, setting showings, lockboxes, etc.)
- ____ Open House Prep & Dialogues
- ____ Buyer Consultation (market overview, needs assessment, agency, compensation dialogues)
- ____ Writing an Offer (contingencies, clauses, addendums, amendments)
- ____ Listing Consultation (pricing, presentation, listing agreement, agency, compensation dialogues)
- ____ Real Estate Review (invitation, preparation, presentation)
- ____ Negotiating (presenting offers, sellers, buyers, brokers)
- ____ Transaction Desk

Score your Toolbox on a scale of 1 to 5:

- ____ Listing Presentation
- ____ Database System
- ____ Checklists



These People Probably Want to Buy/Sell Real Estate

Take out your list of people you know. Go through the names one at a time. Bring the person/family into your consciousness. Think about them and ask yourself these questions regarding their situation. If they fit that particular question, write the number of that question next to their name. After going through your entire list, you should have a clear picture of the potential real estate needs/wants of your customers - and the start of a business plan for yourself. Start contacting your customers using the F.O.R.D system of questions. When they respond to your F.O.R.D questions, listen carefully for changes going on in their lives that may affect their need/desire to buy/sell real estate.

How many of the people you know:

1. Have had an increase in family size in the past year?
2. Have children age 10 and under? (Give your kids a chance brochure.)
3. Have teenage children?
4. Have children who have left home recently?
5. Are living "below or above their means"?
6. Have lived in their same house 7 years or more?
7. Have had their employer/company expand in the past year?
8. Have had their employer/company downsize in the past year?
9. Have received a substantial inheritance?
10. Own a building lot?
11. Are getting married or are recently married?
12. Are getting divorced or are recently divorced?
13. Are getting divorced and married?
14. Have a dream for "Wake-up Money" investment property?
15. Have a dream to live "anywhere"?
16. Have a commute over _____ hours one way?



Does your plan support living out your Life List?

TO HAVE

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

TO DO

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

TO BE

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

TO GIVE

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____



PRODUCTIVITY PLANNER

Project #1_____

Project #2_____

Project #3_____

5 big things I
must do to move
this project forward:

- 1.
- 2.
- 3.
- 4.
- 5.

5 big things I
must do to move
this project forward:

- 1.
- 2.
- 3.
- 4.
- 5.

5 big things I
must do to move
this project forward:

- 1.
- 2.
- 3.
- 4.
- 5.

PEOPLE

People I need to reach out to today.

List the people you have to reach out to today no matter what:

People I'm waiting on.

List the people who you need something from to move forward.

PRIORITIES

The main things I must complete today, no matter what.

List the priorities and to-do's that must be accomplished today and DO these before getting trapped in your inbox and other people's agendas.



BLOCK TIME

“Block time” is a focus-management approach that requires “blocking out” significant amounts of time to advance or complete a major project in your life. It requires you to get clear on a major dream and schedule real-time to leap towards it. Below, detail a dream you have and spend some time answering some questions and planning your block time.

Dream #1:

A dream project I'd love to start or complete is...

The reason this project is a dream of mine and I'm committed to it is...

If I'm ever going to make this dream come true, I'd have to make these things my priority...

A block of time I'm going to dedicate to this dream or project is...(can be a daily block of time or a block of time that is several days or weeks long where you focus on nothing else but the project, like writing a book over the next two weeks).

To create a reality where I will have this much block time to complete the project, I will need to make these adjustments to my life...



Dream #2:

A dream project I'd love to start or complete is...

The reason this project is a dream of mine and I'm committed to it is...

If I'm ever going to make this dream come true, I'd have to make these things my priority...

A block of time I'm going to dedicate to this dream or project is...(can be a daily block of time or a block of time that is several days or weeks long where you can focus on nothing else but the project)...

To create the reality where I will have this much block time to complete the project, I will need to make these adjustments in my life...

Dream #3:

A dream project I'd love to start or complete is...

The reason this project is a dream of mine and I'm committed to it is...

If I'm ever going to make this dream come true, I'd have to make these things my priority...

A block of time I'm going to dedicate to this dream or project is...(can be a daily block of time or a block of time that is several days or weeks long where you focus on nothing else but the project)...

To create a reality where I will have this much block time to complete the project, I will need to make these adjustments to my life...

