

## Radical Integrity + Thoughtful Professionalism + Courageous Ingenuity + Collective Generosity

To begin support around annual planning, assembled are tools to assist you in checking in on your vital signs; the health of your business.

As we set our eyes and planning onward to 2021, I first offer a handful of questions to think through in reflection of 2020. Then, start turning those pages in planning. Need help, just ask. We are all here to help. No one size fits all in planning - a plan is uniquely yours.

What I do know is that those that work their plan & commit to evaluating weekly throughout the year, will find success.

..."A few decades ago, scientists conducted an experiment in the Arizona desert where they built "Biosphere 2" - a huge steel-and-glass enclosure with air that had been purified, clean water, nutrient-rich soil, and lots of natural light. It was meant to provide ideal living conditions for the flora and fauna within. And while it was successful in some ways, in one it was an absolute failure. Over and over, when trees inside the Biosphere grew to a certain height, they would simply fall over. At first, the phenomenon confused scientists. Finally, they realized that the Biosphere lacked a key element necessary to the trees' health: wind. In the natural environment, trees are buffeted by wind. They respond to that pressure and agitation by growing stronger bark and deeper roots to increase their stability."

- Think Like A Monk, Jay Shetty

As you work your way through the pages ahead, where might you take the "pressure and agitation" of 2020 and grow even "stronger bark and deeper roots" to increase your "stability?"

What if our biggest challenges could become our greatest gifts in the days ahead?

Where will you maintain a level of resilience in **2021?**

Where will you discover resurgence in **2021?**

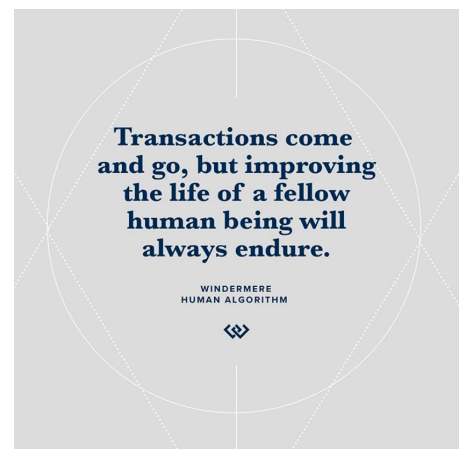
"A year from now you will wish you had started TODAY" - Karen Lamb

Let's start today. Celebrate in one year from now. We are all in, for you.



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The Human Algorithm /THĕ '(h)yōōmən 'algə,rīTHəm/  
the philosophy that drives every member of Windermere.



# Resilience & Resurgence



## VITAL SIGNS A QUICK REVIEW OF 2020

Gross Income YTD	<b>2020</b> 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 2020: \_\_\_\_\_

## 2020 KEY OBJECTIVES

<b>2021</b> 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.

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> 20 "LIVE" Contacts Weekly  | <input type="checkbox"/> Successful Open Houses                | <input type="checkbox"/> Weekly Accountability/Collaboration<br>*With Peers* |
| <input type="checkbox"/> Gross Income YTD   | <input type="checkbox"/> Tracking FLOW: Weekly Activities      | <input type="checkbox"/> 8 x 8 Campaign                                      |
| <input type="checkbox"/> Optimize Sphere/Database   | <input type="checkbox"/> *Customized Scorecard                 | <input type="checkbox"/> Post/Use Social Media Offerings                     |
| <input type="checkbox"/> Tracking Warm & Hot List<br>(cross referencing the 16 questions) | <input type="checkbox"/> Scheduled Post Closing Calls/Campaign | <input type="checkbox"/> Improve Website/Online Presence                     |
| <input type="checkbox"/> "Moving Indicators"  | <input type="checkbox"/> Commit to Monthly Print Marketing     | <input type="checkbox"/> Morning Routine                                     |
| <input type="checkbox"/> Weekly Personal Notes  | <input type="checkbox"/> Just Listed/Sold Campaign             | <input type="checkbox"/> Host Client Event(s)                                |
| <input type="checkbox"/> Consistent Time Blocking/Management                              | <input type="checkbox"/> Monthly WeConnect Newsletter          | <input type="checkbox"/> Annual Property Reviews                             |
| <input type="checkbox"/> Neighborhood News  | <input type="checkbox"/> Consistent Physical Exercise          | <input type="checkbox"/> One-on-One Coaching                                 |
| <input type="checkbox"/> Birthdays/Anniversaries Campaign                                 | <input type="checkbox"/> Buyer Packets                         | <input type="checkbox"/> White Board Use & Set Up                            |
| <input type="checkbox"/> Zillow Profile & Reviews   | <input type="checkbox"/> Seller Packets                        | <input type="checkbox"/> Life List   |
| <input type="checkbox"/> Authentic Social Media Effort                                    | <input type="checkbox"/> Knowing your Numbers: Use of Stats    |  |

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

What 1-3 thing(s) will you stop doing in 2021? \_\_\_\_\_

Where can we help you? \_\_\_\_\_

What is your word for 2021? \_\_\_\_\_



# CHALLENGE OUTLINE

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ONE OR TWO SENTENCES THAT GET TO THE HEART OF THE PROBLEM IN NO UNCERTAIN TERMS	THE CHALLENGE IS:
WHAT I REALLY WANT TO HAPPEN	MY IDEAL OUTCOME IS:
AFFECT ON DOLLARS, PEOPLE, PRODUCTS, SERVICES, CUSTOMERS, VENDORS, FAMILY, TIMING, FUTURE, OUTER OFFICES, ETC...	IT IS SIGNIFICANT BECAUSE:
SHORT, BULLET POINTS THAT IDENTIFY: -HOW/WHEN/WHERE/ WHY IT STARTED -WHO THE PLAYERS ARE -THE FORCES AT WORK -TODAY'S FOCUS -FUTURE IMPACT	RELEVANT BACKGROUND INFORMATION:
ALL THE VARIOUS ACTIONS STEPS I COULD TAKE	MY OPTIONS ARE:
THIS IS THE OPTION ABOVE I PLAN TO PURSUE AT THIS MOMENT	DIRECTION I'M HEADED:
-OPTIONS I'M MISSING? -ON THE RIGHT TRACK? -WHAT WOULD YOU DO DIFFERENTLY.. WHY? -SHOULD I DO NOTHING? -ETC.	WHO DO I NEED TO ASK ADDITIONAL HELP FROM?

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

- \_\_\_ Logistics (i.e. MLS searches, setting showings, lockboxes, etc.)
- \_\_\_ Open House and Floor Call Dialogues
- \_\_\_ Buyer Consultation (market overview, needs assessment, agency, commission dialogues)
- \_\_\_ Writing an Offer (contingencies, clauses, addendums, amendments)
- \_\_\_ Listing Consultation (pricing, presentation, listing agreement, agency, commission dialogues)
- \_\_\_ Real Estate Review (invitation, preparation, presentation)
- \_\_\_ Negotiating (presenting offers, co-op realtors, sellers, buyers)

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 BE**

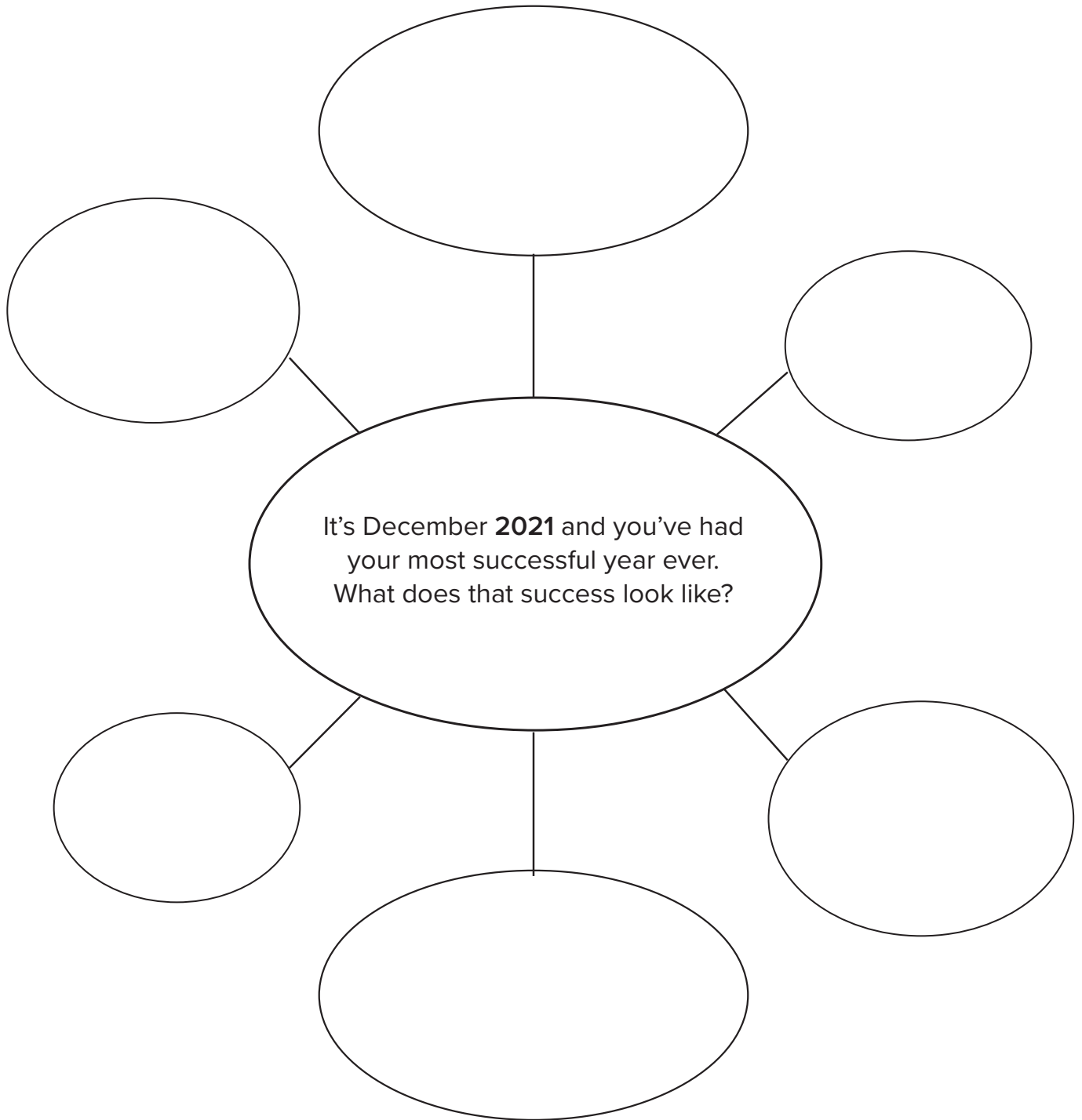
- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_
- 6. \_\_\_\_\_
- 7. \_\_\_\_\_
- 8. \_\_\_\_\_
- 9. \_\_\_\_\_
- 10. \_\_\_\_\_

**TO DO**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_
- 6. \_\_\_\_\_
- 7. \_\_\_\_\_
- 8. \_\_\_\_\_
- 9. \_\_\_\_\_
- 10. \_\_\_\_\_

**TO GIVE**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_
- 6. \_\_\_\_\_
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- 8. \_\_\_\_\_
- 9. \_\_\_\_\_
- 10. \_\_\_\_\_



**“Luck is what happens when preparation meets opportunity”**

- Unknown, (Laura just likes this a lot)