



REAL ESTATE  
**MASTERY**

— WITH JOHN MARRONE + TESSABELLA —

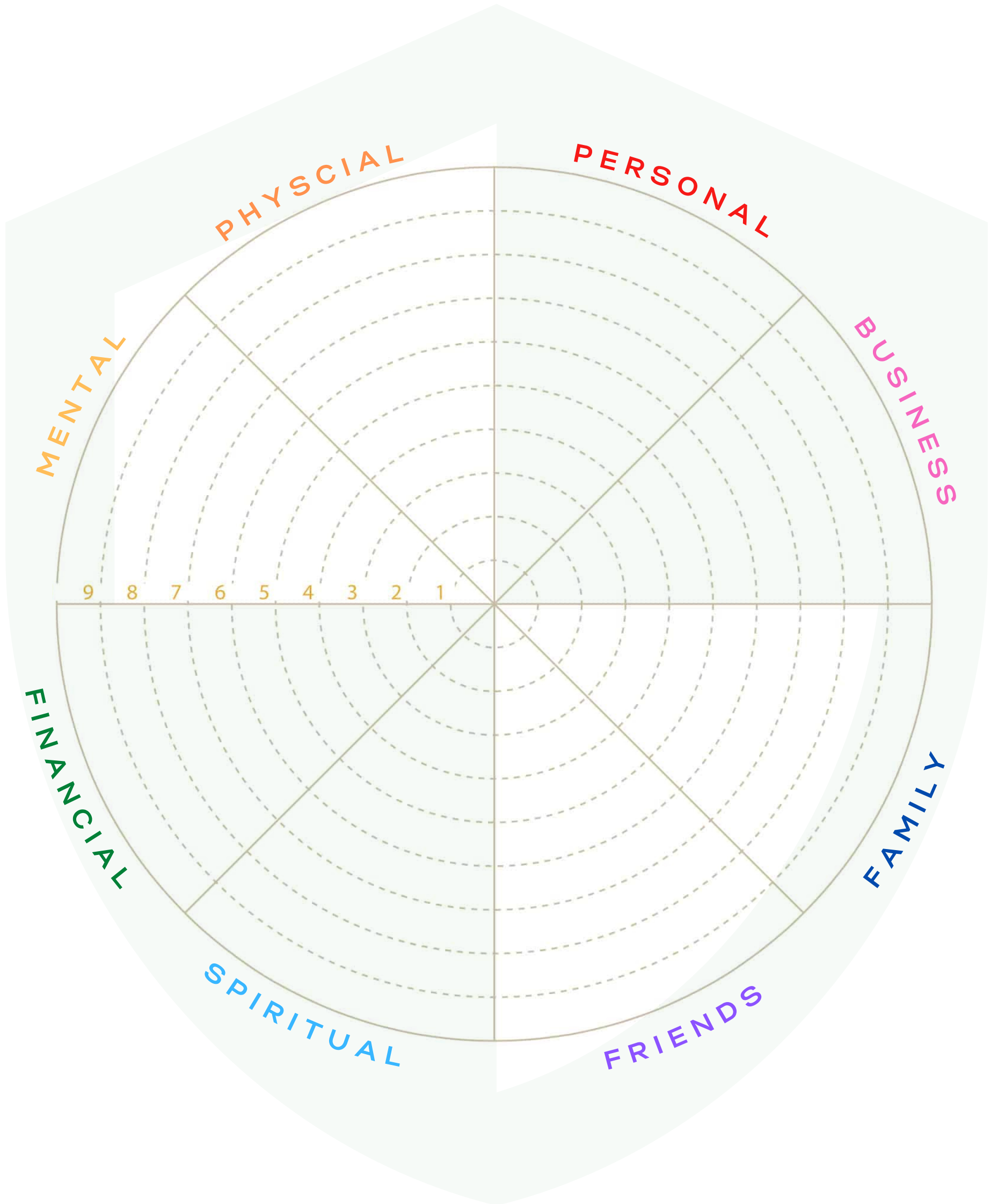
JANUARY



**2023 GOAL SETTING WORKBOOK**

# WHEEL OF LIFE

WHEEL OF LIFE



# COMPASS

<p><b>Name your top 6 achievements in 2022</b> <i>Big, small, what are you MOST proud of?</i></p> <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li><li>4.</li><li>5.</li><li>6.</li></ol>	<p><b>Name 5 challenges you overcame in 2022</b> <i>What was hard? What did you overcome?</i></p> <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li><li>4.</li><li>5.</li></ol>	<p><b>What were 3-5 Lessons learned in 2022?</b> <i>Eg. a skill, aha moment, lesson learned etc.</i></p> <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li><li>4.</li><li>5.</li></ol>
<p><b>What did I learn about myself?</b> <i>Ex: strengths, weaknesses, talents, beliefs, values, hopes, fears etc.</i></p> <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li><li>4.</li><li>5.</li></ol>	<p><b>YOU IN 2022</b></p>	<p><b>What new or existing relationships did I develop?</b> <i>Who did you grow your relationship with?</i></p> <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li><li>4.</li><li>5.</li></ol>
<p><b>If I could go back and do 3-5 things differently in 2022 it would be?</b></p> <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li><li>4.</li><li>5.</li></ol>	<p><b>How did I make a difference in the world in 2022?</b> <i>Big or small, how did you help others/the world?</i></p> <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li><li>4.</li><li>5.</li></ol>	<p><b>Where did I have the most fun?</b> <i>What did you enjoy most in 2022? This could be anything - at work, home, in life!</i></p> <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li><li>4.</li><li>5.</li></ol>

# 2022 REVIEW & HIGHLIGHTS

## COMPASS

<p>Smartest decision I made in 2022?</p> <p>1.</p>	<p>Name 2 most caring services I did in 2022. <i>What was hard? What did you overcome to do the act of service?</i></p> <p>1.</p> <p>2.</p>	<p>What was the biggest risk taken in 2022?</p> <p>1.</p>
<p>What is one word to describe 2022?.</p> <p>1.</p>	<p><b>YOU IN 2022</b></p>	<p>What were the hardest things you tried but did not accomplish in 2022?</p> <p>1.</p> <p>2.</p> <p>3.</p>
<p>What are the top 5 things you want to STOP doing from 2022?</p> <p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>	<p>Name empowering habits that you stayed consistent with in 2022?</p> <p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>	<p>Scale of 1-10 how happy were you all around with your quality of life in 2022?</p> <p>1.</p>

If you were to write a Newspaper Headline that summarized your 2022, what would it say?

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# 2023 PREVIEW & PREPARATION

## COMPASS

<p><b>What top 5 things do I want to achieve in 2023?</b> <i>Big, small, what would make you proud</i></p> <p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>	<p><b>Name 5 challenges you anticipate in the year ahead</b> <i>What do you expect to be hard/difficult?</i></p> <p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>	<p><b>What do I NEED to learn in the year ahead?</b> <i>What do you NEED in order to grow this year?</i></p> <p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>
<p><b>What do I WANT to grow or learn about myself this year?</b> <i>Where will you stretch and grow yourself?</i></p> <p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>	<p><b>YOU IN 2023</b></p>	<p><b>What relationships would like to grow and develop?</b> <i>Who inspires, supports &amp; encourages you?</i></p> <p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>
<p><b>3 things I want to do more of in 2023?</b></p> <p>1.</p> <p>2.</p> <p>3.</p>	<p><b>How specifically will I make a difference in the world in 2023?</b> <i>Big or small, how will you help others/the world?</i></p> <p>1.</p> <p>2.</p> <p>3.</p>	<p><b>Where will I enjoy myself &amp; have fun in my life in 2023?</b> <i>How will you play at work/home/in life?</i></p> <p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>

If you were to write a Newspaper Headline that summarized your 2023, what would it say?

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# PHYSICAL HEALTH

## WHEEL OF LIFE

What does success look like in PHYSICAL Health?

12 MONTH GOALS

12 WEEK GOALS

**GOALS**

# MENTAL HEALTH

## WHEEL OF LIFE

What does success look like in your MENTAL health?

12 MONTH GOALS

12 WEEK GOALS

**GOALS**



# PERSONAL/JOY

WHEEL OF LIFE

What does success look like in PERSONAL/JOY?

12 MONTH GOALS

12 WEEK GOALS

GOALS

# BUSINESS

## WHEEL OF LIFE

What does success look like in your BUSINESS?

12 MONTH GOALS

12 WEEK GOALS

GOALS

# FAMILY

WHEEL OF LIFE

What does success look like in your FAMILY?

12 MONTH GOALS

12 WEEK GOALS

GOALS

# FRIENDS

## WHEEL OF LIFE

What does success look like with your FRIENDS?

12 MONTH GOALS

12 WEEK GOALS

GOALS

# SPIRITUAL LIFE

## WHEEL OF LIFE

What does success look like in your SPIRITUAL life?

12 MONTH GOALS

12 WEEK GOALS

**GOALS**

# FINANCES

## WHEEL OF LIFE

What does success look like in your FINANCES?

12 MONTH GOALS

12 WEEK GOALS

GOALS

# HABIT SHIFT

## STRUCTURE

Empowering Habits! Conducive to your goals	Disempowering Habits! NOT Conducive to your goals
Habit- Trigger-	Habit- Trigger-
Habit- Trigger-	Habit- Trigger-
Habit- Trigger-	Habit- Trigger-
Habit- Trigger-	Habit- Trigger-
Habit- Trigger-	Habit- Trigger-
Habit- Trigger-	Habit- Trigger-
Habit- Trigger-	Habit- Trigger-
Habit- Trigger-	Habit- Trigger-
Habit- Trigger-	Habit- Trigger-
Habit- Trigger-	Habit- Trigger-

Notes:

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# HABIT CONTRACT

## STRUCTURE

Time	Activity	Trigger if needed

I \_\_\_\_\_ will stick to this schedule for my week and will remain discipline to my empowering habits.

If I am to not complete this one day of the week I \_\_\_\_\_ will never let it go more than 1 day without following through with my commitments.

I acknowledge it will not be easy to stick to these empowering habits daily but I will do it because I understand to achieve this ideal day I must (who do you have to become)

1- \_\_\_\_\_

2- \_\_\_\_\_

3- \_\_\_\_\_

4- \_\_\_\_\_

I commit to myself and those it affects and I take complete ownership and responsibility to hit my empowering habits daily.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_



# RELATIONSHIP AUDIT

## STRUCTURE

RELATIONSHIP	DEPOSIT OR WITHDRAWL
Who?	Why?
Who?	Why?
Who?	Why?
Who?	Why?
Who?	Why?
Who?	Why?
Who?	Why?
Who?	Why?
Who?	Why?
Who?	Why?
Who?	Why?
Who?	Why?

# 12 WEEK YEAR

## 12 WEEK GOALS

Now, take those corresponding goals, and break them down into tactics - The more specific and measurable the tactics are, the better your chance of completing them. You will assign tactics (in the most logical order) to the 12 weeks in your plan. Some weeks may have a few tactics to manage and some weeks may only have one big one.

12 Week Goal/Why is it Important? -

Business

Stepping Stone Goal	Start Date or End Date	Is It In Your Calendar?	Was It Done?

## WEEKLY SCORE CARD:

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Personal/Joy

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12 Week Goal/Why is it important?

Relationship

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12 Week Goal/Why is it important?

Health-  
Mental/Physical

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Mental/Physical

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Health-  
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12 Week Goal/Why is it important?

Spiritual

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# 4 PILLARS OF INCOME

WHAT IS YOUR INCOME GOAL?

Per month \$ \_\_\_\_\_

Per year \$ \_\_\_\_\_

Closing per month: \_\_\_\_\_

Closing per year: \_\_\_\_\_

WHAT ARE YOUR 4 PILLARS OF INCOME?

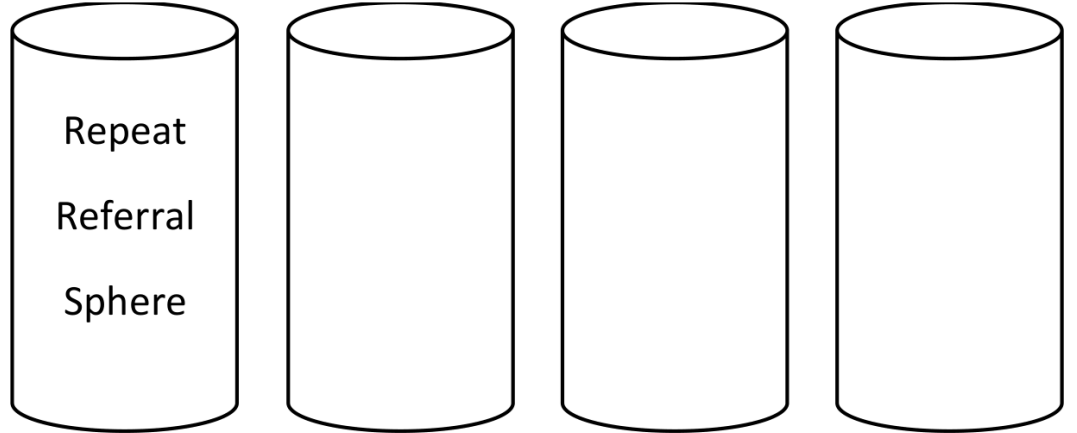


# REAL ESTATE BUSINESS GOAL SETTING

## EXAMPLES

- Client events
- Facebook
- LinkedIn
- Instagram
- Door Knocking
- Open Houses
- FSBOs
- Expireds
- Seminars
- Investors
- Direct Mail
- SEO/Blog
- YouTube
- Landlords
- Renters
- Agent Referrals
- Builders
- REO
- Relo
- PPC
- Portals
- Purchased Databases

## 4 PILLARS OF YOUR BUSINESS



Gross Yearly Commission Goal:

Average Sales Price

Average Commission %

Average Commission (**B\*C**)

# of Transactions (**A / D**)

Average Conversion Rate

Total Leads (**E / F**)

Leads / Week (**G / 48\***)

## Weekly Lead Generating Activities

Fill in tasks with numbers. Example: 4x open houses, 2x blog posts, 50x Expired, etc

**Instructions:** Select 4 prospecting methods you will *exclusively* focus (Repeat, Referral, and Sphere should ALWAYS be a pillar). Fill your gross commission goal under each pillar. Your goal is that *every* pillar will, by itself, meet your goal. If one pillar fails, you still have other pillars working.

Work backwards from the goal using the assumptions and math steps outlined. How many leads do you need each week to hit your goal? Finally, fill in action items that will earn the number of leads.

Fill in a weekly development goal: business dev (working *on* your business instead of *in* it) and professional (reading, education, etc).

Check weekly that you've completed your action items. Check the box if you earned your target number of leads. If not, consider modifying your lead generation activities.

A	A	A	A
B	B	B	B
C	C	C	C
D	D	D	D
E	E	E	E
F	F	F	F
G	G	G	G
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMPLETE? <input type="checkbox"/>	COMPLETE? <input type="checkbox"/>	COMPLETE? <input type="checkbox"/>	COMPLETE? <input type="checkbox"/>
Business Development		<input type="checkbox"/>	
Professional Development		<input type="checkbox"/>	

# FINANCIAL GOAL PLAN

My Net Income Goal for the year: \$\_\_\_\_\_

My Expenses: \$\_\_\_\_\_

My Gross: \$\_\_\_\_\_

1. My closed commission (GCI) goal for the year: \$\_\_\_\_\_

2. My average commission per side (unit) will be: \$\_\_\_\_\_

3. The number of closed sales (sides) necessary to achieve my income goal (#1 divided by #2): \_\_\_\_\_

4. My projected closings will come from: A. Listings sold: \_\_\_\_\_ B.

Buyers sold: \_\_\_\_\_

5. Projecting that \_\_\_\_\_% of my listings will sell, the number of listings I will need to take in will be (#4A divided by the % of #5):\_\_\_\_\_

6. Considering that \_\_\_\_\_% of my buyer contracts will cancel, I will need to write a total number of (#4B divided by (100% minus the % of #6)):

\_\_\_\_\_

7. Since I plan to get listings on \_\_\_\_\_% of my listing appointments, I will need to go on the following number of listing appointments (#5 divided by the % of #7):

\_\_\_\_\_

8. Since I sell a home to \_\_\_\_\_% of the buyers I work with, I will need to work with the following number of new buyers (#6 divided by the % of #8):\_\_\_\_\_

9. My total number of appointments needs to be: Listing appointments \_\_\_\_\_

Per Month \_\_\_\_\_Per Week New Buyers \_\_\_\_\_ Per Month

\_\_\_\_\_Per Week Total \_\_\_\_\_ Per Month \_\_\_\_\_Per Week

# BUSINESS MARKETING PLAN

## TOP 50

- Monthly email
- Quarterly mail
- Call once a month
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Sphere of Influence

- Continual monthly contact system
- Personal phone call 4 times a year
- Birthdays and Anniversaries
- One letter a month
- \_\_\_\_\_
- \_\_\_\_\_

## Prospecting

- Geographic Farming
- For Sale By Owner
- Expired Listings
- Out of Town agents
- First time home buyers
- Social Networking (Facebook, Twitter etc.)
- Referral networks and clubs
- Out of town buyers
- Relocation resources
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Website

- Maintain destination website
- Add more than six photos of each listing
- Publish open houses weekly
- Publish featured properties
- Use personalized auto-responders
- Utilize Vanity and Content site
- Utilize stealth sites (CMA's FSBO Branding here is minor)
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## E-Marketing

- Consciously collect email addresses
- Return e-mail in a timely fashion
- Have multiple websites
- Include esignature with call to action
- Give away something of value
- Capture email for drip campaigns
- Brand your own name (not @gmail but @yourcompany or @your company)
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Other

- Read four business books this year
- Attend a minimum of four seminars a year
- Attend national conventions such as NAR
- Foster relationships with agents who are where you want to be (financially, lifestyle, transactions)
- Mentor with agents who are where you want to be income, lifestyle and transaction-wise
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_





# VISION BOARD TEMPLATE

<p><b>WEALTH + PROSPERITY</b> SE or Rear Left</p> <p>Purple, blue, red Wood Element</p>	<p><b>FAME + REPUTATION</b> S or Rear Middle</p> <p>Red Fire Element</p>	<p><b>RELATIONSHIPS</b> SW or Rear Right</p> <p>Pink, red, white Earth Element</p>
<p><b>FAMILY</b> E or Middle Left</p> <p>Green Wood Element</p>	<p><b>HEALTH (CENTER)</b></p> <p>Yellow, orange, earth tones</p>	<p><b>CHILDREN + CREATIVITY</b> W or Middle Right</p> <p>White Metal Element</p>
<p><b>KNOWLEDGE + SELF-CULTIVATION</b> SW or Front Left</p> <p>Blue, green, black Earth Element</p>	<p><b>CAREER</b> N or FRONT DOOR</p> <p>Black Water Element</p>	<p><b>TRAVEL + HELPFUL PEOPLE</b> NW or Front Right</p> <p>White, Gray, Black Metal Element</p>

# WEEKLY PROGRESSION

## REFLECT AND REVIEW

Equity1 GOAL & 1 COMMITMENT to get you closer  
Pick at 1 - 2 goals in each area to focus on for the week.

(Sunday review)  
Did You Progress  
in each area. (Y/N)

BUSINESS/CAREER

Goal "the what"

Commitment

FINANCIAL

Goal "the what"

Commitment

HEALTH  
MENTAL/PHYSICAL

Goal "the what"

Commitment

RELATIONSHIPS

Goal "the what"

Commitment

PERSONAL

Goal "the what"

Commitment

SPIRITUAL

Goal "the what"

Commitment

# MUST CRUSH LIST

## ACCOUNTABILITY

MUST CRUSH List Today (priorities with equity):  
 (Do this page before you respond to any emails or social media)

Date: \_\_\_\_\_

<b>Equity</b>	<b>TASK/ACTION</b>	<b>Time?</b>	<b>Completed?</b>
Business/ Career			
Health/M&P			
Finances			
Personal/Leisure			
Spiritual			
Relationships			

### Eat The Frog Task:

My Goal for today (this is a place to put a business goal. Number of calls, sales, appointments. Whatever you track that drives income):

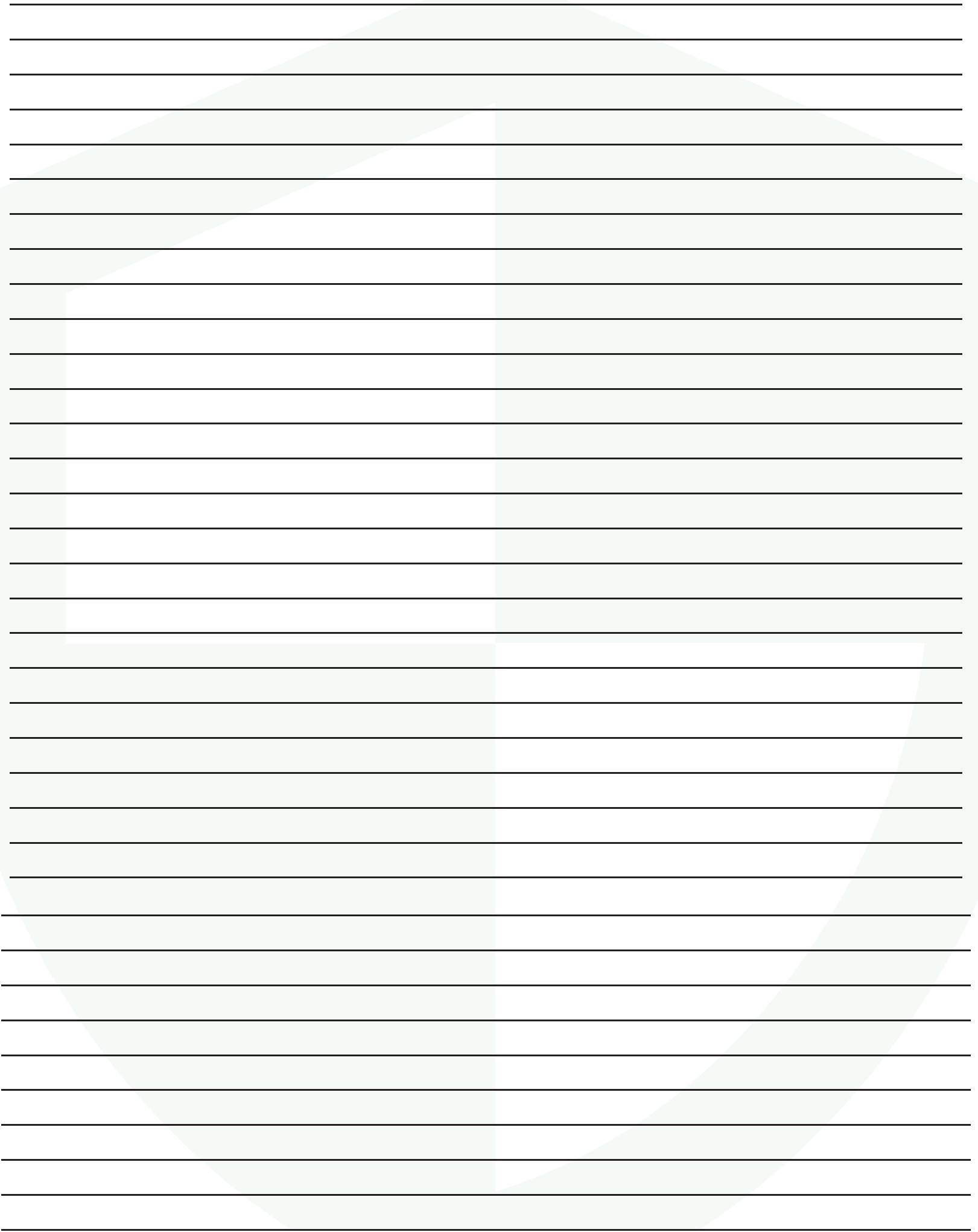
1) \_\_\_\_\_

2) \_\_\_\_\_

### Who do I need to contact today and what's the outcome that I want?

NAME	OUTCOME I WANT AND ACTUAL OUTCOME	Time I will be calling/emailing

# NOTES



A series of horizontal lines for writing, contained within a large, light green shield-shaped graphic that serves as a background. The lines are evenly spaced and extend across the width of the page.



