



# Transaction

**SESSION 20**

**Plan Your Future**

# Today's Agenda

  
Real Estate  
Expert



  
Lead  
Generation



  
Lead  
Follow-up



  
Transaction

Notes:

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# Set Your Sights on a Big Future



How you think matters. How you think in the beginning *really* matters!

**Gary Keller**

*The Millionaire Real Estate Agent*

## Mindset Matters

- What's your mindset?

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- Are you aligned with your heart?

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- Are you ready to take action to have a successful day?

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Notes:

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## Revisit Your Value Proposition

- Does my Value Proposition truly reflect who I am, the value I bring, and the benefit my clients will experience working with me?

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- Am I confident sharing my Value Proposition with my contacts? If not, how can I make it easier to express my value?

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**My Value Proposition**

## Revisit Your Big Life

Is there anything you would change after four weeks? Are you thinking big enough?

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# Your Big Why



... one thing all high achievers have in common is they are working for a Big Why. The Big Why is about having a purpose, a mission, or a need that in turn gives you focus.

*The Millionaire Real Estate Agent*

1. What topics or causes are most important to you?

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2. What gives you energy and fuels you personally?

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3. What is something you would do even if you were not paid?

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4. What do you envision for yourself and your future?

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**My Big Why**

# Have a Smart Money Business



How you think matters. How you think in the beginning *really* matters!

**Gary Keller**  
*The Millionaire Real Estate Agent*

## Mindset Matters

- What's your mindset?

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- Are you aligned with your heart?

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- Are you ready to take action to have a successful day?

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Notes:

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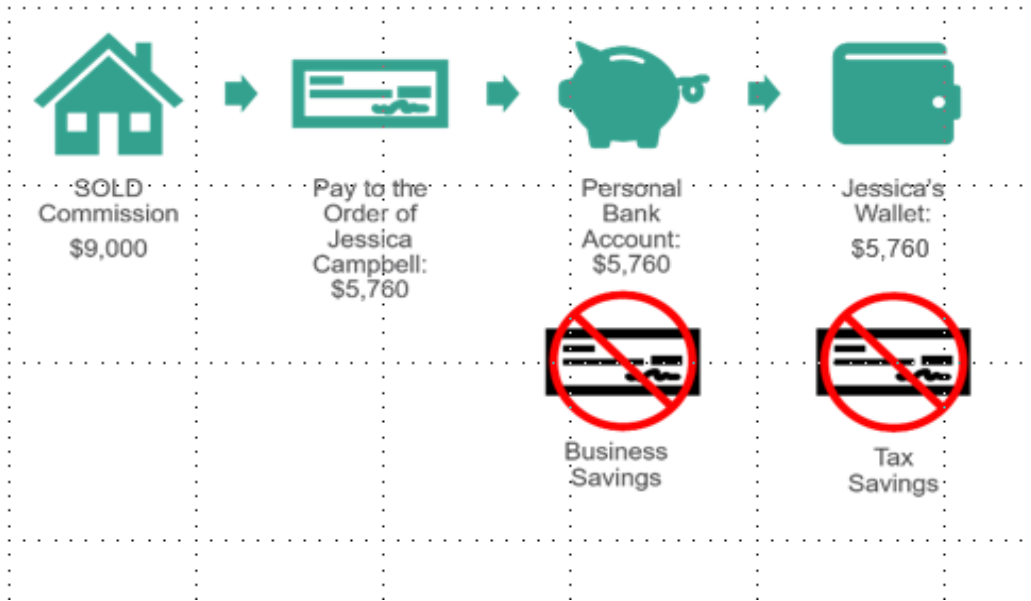
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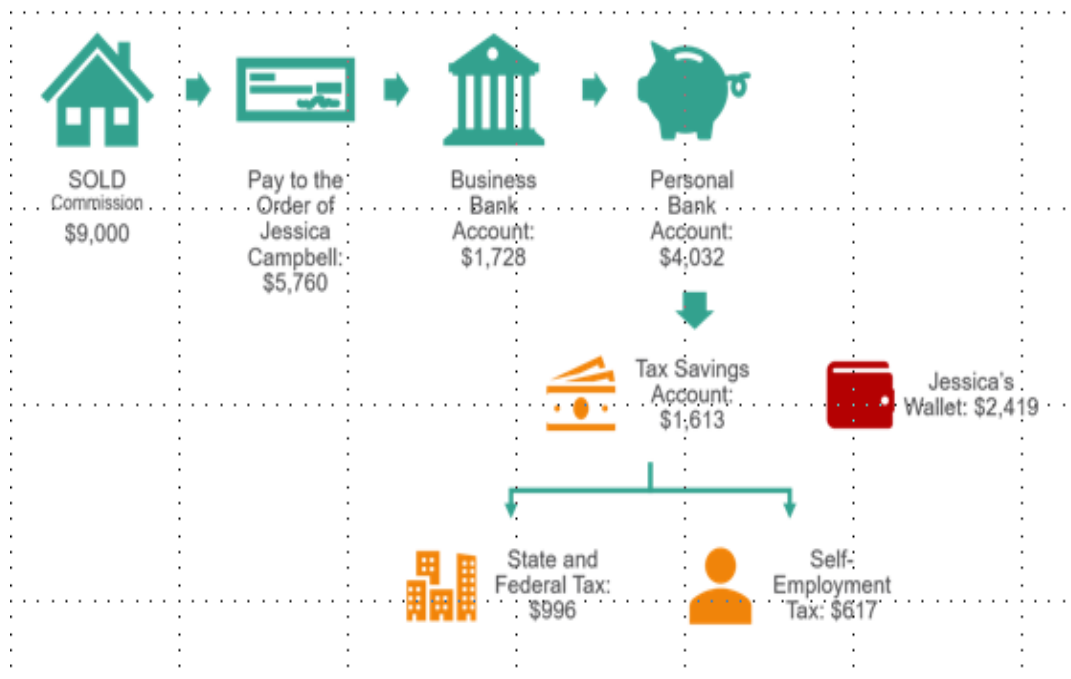
# Have a Smart Money Business



## Scenario 1



## Scenario 2





# Financially Sound or Unsound?



1. Is the \$9,000 commission Jessica receives profit or income/revenue?

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2. Why is Jessica getting a check for \$5,760 for a commission of \$9,000?

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3. Which scenario is financially sound?

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4. What makes it financially sound?

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Notes:

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Money is good for the good it can do.

**Gary Keller**



# The Flow of Money

**Profit:** How much money do I want in my bank account at the end of the year?

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**Income:** How many homes do I need to sell to achieve my profit goal?

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**Expenses:** How can I minimize my expenses to maximize my net income?

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## Best Practices for a Smart Money Business

- Gain clarity on your Big Why and plans for your future
- Set your personal and business budgets
- Set up your business entity
- Open additional bank accounts for taxes, expenses, and other savings
- Download and use the MREA Chart of Accounts
- Purchase/Download tax accounting software
- Hire an accountant, CPA, attorney, tax adviser
- Set dates to calculate and pay your estimated taxes
- Prepare for your future: insurance, savings, investments



Think and act the wage you want before you earn it. Average is as average does. Good is as good does. And great is as great does. What you do is who you become.

*SHIFT*

## Revisit Your Profit / Net Income Goal

A	Profit / Net Income Goal	\$
B	Company Dollar and Royalty Cap (~15% of GCI)	\$
C	Business Expenses (~35% of GCI)	\$
D	Total Gross Commission Income (GCI) (A+B+C)	\$
E	Your Average Commission Amount	\$
F	Annual Transaction Goal (D/E)	#




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# Commit to the Success System

Action	WINS What went well	OPPORTUNITIES What could be improved
	What did you have in place to help you accomplish your Daily Success System?  How will you keep this in place?	What challenges prevented you from completing your Daily Success System?  How will you address these opportunities?
Working with Accountability Partner		
Having 10 conversations a day		
Adding 10 contacts to database		
Adding 10 contacts to database		
Lead generating through social media		
Adding enrichments to daily learning		
Setting appointments		
Getting signed agreements		
Closing deals		
Other		

# Accountability

1. Keeps your mindset focused and positive
2. Reminds you of your Big Why
3. Challenges you and makes you uncomfortable at times
4. Is one of our Six Personal Perspectives – Be Accountable

## People

- Accountability Partner
- Productivity Coach
- Mentor
- KW MAPS Coach

## Tools

- 4-1-1
- Time blocking
- The ONE Thing

What type of accountability will you choose going forward?

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## Aha's

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# Plan for Learning

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| <ul style="list-style-type: none"> <li>• Learn More About Your Market             <ul style="list-style-type: none"> <li>• Preview homes, tour neighborhoods, understand amenities</li> <li>• Days on market</li> <li>• New construction</li> <li>• Codes</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• Attend Events             <ul style="list-style-type: none"> <li>• Family Reunion</li> <li>• Mega Agent Camp</li> </ul> </li> <li>• Read             <ul style="list-style-type: none"> <li>• <i>The Millionaire Real Estate Agent</i></li> <li>• <i>SHIFT</i></li> <li>• <i>The ONE Thing</i></li> </ul> </li> </ul> |
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## KW Courses

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| <ul style="list-style-type: none"> <li>☐ Mindset and Accountability             <ul style="list-style-type: none"> <li>☐ Six Personal Perspectives</li> <li>☐ BOLD \$</li> <li>☐ Quantum Leap</li> </ul> </li> <li>☐ Command             <ul style="list-style-type: none"> <li>☐ Command Your Business (online)</li> </ul> </li> <li>☐ Smart Finances             <ul style="list-style-type: none"> <li>☐ Profitability – Agent Financials</li> <li>☐ Business Planning Clinic</li> </ul> </li> <li>☐ Hiring             <ul style="list-style-type: none"> <li>☐ Career Visioning</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>☐ Sales Skills             <ul style="list-style-type: none"> <li>☐ Connect Live videos (online)</li> <li>☐ No Ceilings – Level Up Your Lead Generation (online)</li> <li>☐ Train the Presenter \$</li> <li>☐ Customer Experience</li> <li>☐ Win-Win Negotiations</li> </ul> </li> <li>☐ DEI             <ul style="list-style-type: none"> <li>☐ The Color of Real Estate</li> <li>☐ Unconscious Bias</li> <li>☐ Agent of Distinction \$ (online)</li> </ul> </li> </ul> |
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## My Learning Plan

JAN	FEB Family Reunion	MAR	APR
MAY	JUN	JULY	AUG Mega Agent Camp
SEP	OCT	NOV	DEC



# Design Your Future

Future Plan: Next 12 Months	
<b>Big Why</b> My purpose, mission, or need that keeps me focused	
<b>Value Proposition</b> My commitment to my clients	
<b>Profit Goal</b> My intended Net Income to fund by Big Why	
<b>Number of Transactions</b> My goal to attain my Net Income	
<b>Smart Database</b> My goal for the number of contacts in my database and plans for touches	
<b>Smart Money Business</b> How I will manage my finances, keep expenses low, and save and pay for taxes	
<b>Learning</b> My plan for continued lifelong learning and improvement	
<b>Accountability</b> How I will remain accountable to my Future Plan	



Get real about your situation and get right about what you're doing. Bring a greater sense of clarity, priority, and focus to your work.

*SHIFT*



# Final Aha's

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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?



# Daily Success System

















## Success Activities

These are suggested activities for the second half of your session.



### DAILY SUCCESS SYSTEM

- \_\_\_ of 10 CONVERSATIONS
- \_\_\_ of 10 CONTACTS ADDED
- \_\_\_ of 10 HANDWRITTEN NOTES
- 10-5-1 SOCIAL MEDIA ENGAGEMENT
- ENRICHMENTS
- APPOINTMENTS
- AGREEMENTS
- CLOSINGS

10					
					
5					
1	 <b>Social Media Engagement</b>				

WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance.

# Conversation Sheet

Get your phone and the list of contacts you prepared for this session. You may also have a few referral names to connect with.

Use the conversation starters provided to you in earlier sessions.

1. Call for 20 minutes and make contact with as many people as possible.
2. Ask for business, that is, an appointment, if it's a strong lead.
3. Ask for referrals from each contact.
4. Offer your KW App to each contact.

Record your results below and share them at the end of the conversation.

Name	#	Email	Notes

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