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Year in Review + Year Ahead

The 90-Minute Business Reset for Real Estate Agents

Welcome

Congratulations on taking this step. Seriously. Most agents go from one deal straight to the next and never stop to look at their year. You just did something that most of your competition won't, and you'll thank yourself for it later.

This guide is built to be simple. In about 90 minutes, you'll look honestly at your year, find the **two areas** that will move your business the most, and build a 90-day plan around them. No overwhelm, and no 40-page workbook to get through.

Whether this was a record year or a rough one, you're in the right place. Pour a coffee, be kind to yourself, and let's get started.

How it works

1. **Look back:** your numbers, your wins, your lessons
2. **Find your focus:** rate 8 areas of your business and pick your lowest two
3. **Plan forward:** goals and a 90-day action plan

Before you start

- Grab a pen and set aside 90 minutes. Break it into two sittings if you need to.
- Estimates are fine. Don't skip a blank because you don't have the exact number.
- **New to the business (under 2 years)?** Some numbers will be small or blank. That's okay. This is your starting line.
- **Veteran agent?** Be extra honest in the health check. Plateaus hide in the areas that feel comfortable.

Tip: click any blue box to type your answer. Save the file when you're done.

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Your Numbers

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This is your scoreboard. Fill in what you know. Estimates are fine.

A. The Year at a Glance

	Your number
Total closed transactions	
Total sales volume ($)	
Gross commission income, GCI ($)	
Net income, after splits, fees, and business expenses ($)	
Average net income per closing ($)	
Buyer sides / Listing sides	/

B. Where Did Your Business Come From?

List each lead source that produced a closing, then what you spent on it.

Lead source	Closings	$ spent	GCI earned
Sphere / past clients			
Referrals			
Open houses			
Social media			
Paid ads / purchased leads			
Geographic farming			
Other:			

Your BEST source (most GCI for the least money):

Your WORST source (most money for the fewest results):

C. Your Conversion Funnel

Step	Number	Rate
New leads / inquiries		
Real conversations had		% of leads
Signed agreements (buyer or listing)		% of conversations
Closed transactions		% of agreements

Where's your biggest leak? Circle the step with the lowest percentage. That's a clue for the health check coming up.

Can't fill this in? Your first goal is to start tracking.

Wins, Lessons, and Clean-Up

Numbers tell you what happened. This page tells you what it meant.

A. Look Back

My best moment this year was...

My biggest frustration or disappointment was...

If I could redo one thing this year, I'd...

The lesson I'm taking into next year is...

B. Quick Clean-Up

Subscriptions, tools, or lead sources I'm cancelling (if it didn't produce a closing or save real time, it goes)

- ☐
- ☐
- ☐

Two tasks I'd hand off if I could (to an assistant, a transaction coordinator, or automation)

1.
2.

C. Brokerage Check-In

Your brokerage is your biggest business expense and your biggest business partner. When did you last evaluate it?

What I actually paid my brokerage this year (splits + fees + desk/tech/E&O): $

That is about **% of my GCI (from page 2).**

Answer honestly	Yes	Not sure	No
I know exactly how my split, cap, and fees work	☐	☐	☐
What I pay is fair for what I get back	☐	☐	☐
I get real training, support, and tools I actually use at my stage	☐	☐	☐
Leadership is responsive, and I feel part of a community	☐	☐	☐
My brokerage helps me grow, not just process paperwork	☐	☐	☐

- **Mostly Yes:** Stay put and use more of what you're paying for.
- **Mostly Not sure:** Spend 30 minutes this month getting your fee and split details in writing.
- **Three or more No answers:** Worth exploring. Talk to a few brokerages before deciding.

Before you ever switch, check your agreement for termination terms, how pending listings and referral fees are handled, and any non-compete or fee obligations. Timing matters.

The 8-Area Health Check

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Rate each area from 1 to 5, based on how your year actually went, not how you wish it went.

1 = Struggling | **3** = Okay, but inconsistent | **5** = Strong and working

#	Area	The question to ask yourself	Score
1	**Lead generation**	Do I have a steady, predictable flow of new leads, or does it come in waves?	
2	**Conversion**	Of the leads I get, how many become clients? Did my funnel numbers on page 2 show a leak?	
3	**Database and follow-up**	Do I stay in touch with past clients and my sphere on a schedule, or only when I remember?	
4	**Value proposition and presentations**	Can I clearly explain what I'm worth to a buyer or seller before they sign anything?	
5	**Marketing and online presence**	Am I easy to find and consistent about showing up? Are my reviews and bio current?	
6	**Systems, tech, and AI**	Do my tools save me time, or am I paying for apps I barely use?	
7	**Profitability**	Do I know what I actually net per deal and which expenses are worth it?	
8	**Time and well-being**	Do I have boundaries, time off, and energy left at the end of the week?	

Your total score: _____ **/ 40**

Three quick fact-checks

They'll help you score honestly.

The last time I cleaned and organized my database was: _____

Closings this year where I collected a review or testimonial: _____ **of** _____

Hours per week I spend on tasks that don't make money: _____

How to read it

- **30-40:** Strong foundation. Your growth is in the details, so focus on your lowest two.
- **20-29:** Solid, with clear room to grow. This is where most agents land.
- **Under 20:** Great news. You now know exactly where to start, and every point you add will show up in your income.

Now circle your two lowest scores. If there's a tie, pick the two that would make the biggest difference to your income or your sanity. Those two areas are your focus for next year. Page 5 is built around them.

Pick Your Focus + Next Year's Goals

This is where the guide turns into a plan.

A. Your Two Focus Areas

Look back at your health check on page 4. Write down your two lowest-scoring areas.

	Area	Score	Why this one is holding me back
Focus #1			
Focus #2			

Don't try to fix all eight. Two areas, done well, will change your year more than eight areas done halfway.

B. Your Income Goal, Reverse-Engineered

Start with the income you want and work backward to the daily activity it takes. Use your rates from page 2 as decimals (25% = 0.25).

	Your number
Net income I want next year ($)	
Average net income per closing (from page 2) ($)	
Closings I need (income goal ÷ net income per closing)	
Signed agreements needed (closings ÷ your agreement-to-close rate)	
Real conversations needed (agreements ÷ your conversation-to-agreement rate)	
Conversations per week (conversations ÷ 50 weeks)	

Is that number realistic for your schedule? If it feels impossible, adjust the income goal or the focus areas, not your sanity. No funnel data from page 2? Your first goal is to start tracking.

C. One Goal Per Focus Area

Make each goal specific and measurable.

Focus #1 goal:

Focus #2 goal:

Weak: "Do better at follow-up."
Strong: "By March 31, every past client gets a call or text from me twice a year, tracked in my CRM."

D. Your One Thing

If I only accomplish one thing next year, it will be:

Your 90-Day Action Plan

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Big goals get done in small, scheduled steps. Plan the next 90 days, then repeat each quarter.

Quarter 1 Priorities

Jan to Mar, or the next 90 days. Choose actions you can start this week. "Set up a monthly past-client email" beats "build a better database." In **Linked to**, write Focus 1, Focus 2, or Income.

#	Action	Linked to	Start date	Done
1				☐
2				☐
3				☐

My weekly non-negotiables

2 or 3 small habits that keep you on track.

☐

☐

☐

Quarterly Check-In

Put your check-in dates on your calendar now (use the table below). At each check-in, ask:

- What worked?
- What didn't?
- Am I on pace for my income goal?
- What are my 3 priorities for the next quarter?

Your Year at a Glance

	Q1	Q2	Q3	Q4
My top priority	*(from the plan above)*			
Check-in date				

Your accountability partner (a friend, mentor, or colleague who'll ask how it's going)

You did the hard part.

You looked honestly at your year, picked your focus areas, and built a plan. Most agents never get this far. The only thing left is to start.

Your 3 next steps (this week)

- [ ] Put your quarterly check-in dates on your calendar.
- [ ] Start your first action from page 6.
- [ ] Tell your accountability partner your "One Thing."

Help for your focus areas

Find your two lowest scores from page 4 and start there.

If your focus is...	Start here
Lead generation and conversion	Lead Generation for Real Estate Agents
Database and follow-up	Sphere and Referral Marketing
Value proposition and presentations	Get More Listings | Building a Brand
Marketing and online presence	Online Marketing | Social Media | Video
Systems, tech, and AI	Leveraging AI
Profitability, time, and well-being	Real Estate Advice

Want a second set of eyes?

Curious how your numbers compare, or want help with your plan? Let's talk.

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