

# The Perfect Real Estate Assistant

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## Session 18

### Assistant Session

### Goal Setting/How to be a Perfect Real Estate Assistant

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## Session 18—Assistant Session: Goal Setting/How to be the Perfect Real Estate Assistant

### **Objectives for Today's Session**

1. Tools for goal setting
2. Business Plans for your business and assistant
3. Systems for accountability to reach goals
4. Corrective Action Report
5. 90-day review
6. Assistant Evaluation and Team Evaluation
7. Characteristics of a great Executive Assistant
8. Review of the top 10 ideas/systems from class

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<https://www.facebook.com/mapscoaching>
2. Only paid participants may listen and contribute.
3. To ask a question or make a comment, please use the chat box
4. If you would like to speak, please wait until the instructor opens comments towards the end of the session.
5. Complete all assignments prior to the session.
6. Be PREPARED!

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## Agenda for Today's Session

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## Get Ready!

Complete the questions on this page as a warm-up to prepare for your coaching session.

Are your goals as a team clearly defined?

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Are your goals realistic for the team?

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Are your goals visible?

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What are your systems for accountability?

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Are you a numbers monster?

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What are the characteristics of a great executive assistant?

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Do you personally have a system to bring business to the team?

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What are the top 10 ideas/systems you received from this program?  
Be prepared to answer on the call.

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Are you working on your profit share and building your downline?

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## GOAL SETTING

### The Importance of Goal Setting

1. It gets everyone on the team going in the same direction
2. You are clear about the motivation of the goals
3. \_\_\_\_\_
4. \_\_\_\_\_

### 5 Must Do's in Goal Setting

1. Post them
2. Team effort
3. Checkpoints
4. \_\_\_\_\_
5. \_\_\_\_\_

### 5 Mistakes to Avoid

1. Not visible
2. Secret
3. No timelines
4. Checkpoints
5. Too ambitious

## Create Success for the Team When Building Goals

1. How clear are your team targets and goals?
  - Who wrote the goals?
  - Did you ask each person and aggregate the goals?
  - Who knows about the goals?
  - Can everyone state the goals?
  
2. How much time are you thinking about them?
  - Do you delegate to others to help with compiling numbers?
  - Do you delegate to others to help build goals for the future?
  - Do you delegate thinking?
  
3. Do all the team members know the targets and goals?
  - Do you review regularly?
  - Do you have the targets and goals posted for all to see?
  - Do you have timelines?
  
4. Are there signs there might be confusion over those goals.
  - Who is struggling with being on the team?
  - Who is struggling with targets and goals?
  
5. How often are you reviewing progress?
  - daily?
  - weekly?
  - monthly?
  - quarterly?
  - semiannually?
  - yearly?

➤ **Is it in your yearly schedule?**

### WHY SHOULD THE TEAM AND I SET GOALS?

1. Anyone who has done anything worthwhile anywhere has consciously or unconsciously set a goal.
2. Goals keep us focused.
3. Goals give us a purpose.
4. Team building.
5. Creates a community.



## Steps to Goal Setting

### STEP 1: DESIRE

What is your passion and desire about the goal?

How do you identify intense desire, passion?

What is your definition of intense desire?

### STEP 2: WRITE IT DOWN

When words are written down and then repeatedly re-written they have a maximum effect. Written words convey images, pictures, feelings, & emotions to the mind. When it is a written word, it is no longer a thought.

Ways to successfully write the goal.

- a. *Business Plan*
- b. *Whiteboard*
- c.
- d.

**STEP 3: LIST ALL OBSTACLES**

When you set a goal, you need to write down a list of potential obstacles you may face. Are there people who won't understand your goal and discourage you?

What other roadblocks do you face? Is it manpower, education?

List them, analyze them, and develop a strategy to eliminate the roadblock.

**STEP 4: DEADLINES**

Creating deadlines is critical to the success of achieving the goal. With no deadlines the goal constantly moves and is never reachable.

How to deadline your goals?

- 1) Break them down into manageable stages.
- 2) Work out a reasonable time frame. Factor in a safety net for unexpected delays. They happen.
- 3) Put the deadline date for each stage in you plan whether it is your computer, on the wall or notebook.
- 4) The last item is the last date. That creates the final deadline for the accomplishment of that goal. I would always put in an additional cushion.

**STEP 5: PUT THINGS IN LOGICAL ORDER**

List all items needed to achieve goal.

Rank in order of what needs to be done first. They need to be in a logical order. List the steps taking into consideration any obstacles you may face.

Factor in room for the unexpected. Have more than one option at crucial stages. The flow can then follow a different route and still arrive at the same destination.

This process is very gratifying because the goals' success becomes clear.



**STEP 6: VISUALIZING / PICTURES**

The brain often thinks in pictures. For example: if you have a goal to purchase a particular vehicle, you could attach an image of the vehicle to your goal. Visualizing the goal creates a mental picture.

What does it feel like to achieve your goal?

What does it do for you personally? ...As a team?

**STEP 7: PERSISTENCE**

*This is the most important step...*

The previous six steps are essential and crucial, but if you do not persist, your plan and goal go down the tubes. You **must** keep at it day after day.

Do not let anything or anyone else convince you to quit or change your goal. Negative mental habits kill the goal.

**STEP 8: The goal is realized with persistence**



## Yearly Business Plan

### A. YEARLY GOALS FOR 20\_\_

1. Income
2. # Listing Appointments
3. # Listings Taken
4. # Listings Sold
5. # Buyer Sales
6. # Price Improvements

### B. MONTHLY GOALS FOR 20\_\_

1. Income
2. # Listing Appointments
3. # Listings Taken
4. # Listings Sold
5. # Buyer Sales
6. # Price Improvements

### C. WEEKLY GOALS FOR 20\_\_

1. Income
2. # Listing Appointments
3. # Listings Taken
4. # Listings Sold
5. # Buyer Sales
6. # Price Improvements

## Sample Yearly Business Plan



### A. YEARLY GOALS FOR 20\_\_ 289 properties sold

|                           |             |
|---------------------------|-------------|
| 1. Income                 | \$4,046,000 |
| 2. # Listing Appointments | 375         |
| 3. # Listings Taken       | 240         |
| 4. # Listings Sold        | 204         |
| 5. # Buyer Sales          | 85          |
| 6. # Price Improvements   | 120         |

### B. MONTHLY GOALS FOR 20\_\_

|                           |           |
|---------------------------|-----------|
| 1. Income                 | \$337,166 |
| 2. # Listing Appointments | 31        |
| 3. # Listings Taken       | 20        |
| 4. # Listings Sold        | 17        |
| 5. # Buyer Sales          | 7         |
| 6. # Price Improvements   | 10        |

### C. WEEKLY GOALS FOR 20\_\_

|                           |          |
|---------------------------|----------|
| 1. Income                 | \$84,292 |
| 2. # Listing Appointments | 8        |
| 3. # Listings Taken       | 5        |
| 4. # Listings Sold        | 4.25     |
| 5. # Buyer Sales          | 1.75     |
| 6. # Price Improvements   | 2.5      |

**Monthly Budget (this can be set up online or on a spreadsheet)**

| Category  | Monthly Expense |
|---|-----------------|
| <b>OFFICE-RELATED EXPENSES</b>  |                 |
| ▪ Rent / Desk fees  |                 |
| ▪ Utilities   |                 |
| ▪ Office insurance  |                 |
| ▪ Phone<br>-- Cell phone<br>-- Office phone   |                 |
| ▪ Supplies<br>-- Paper<br>-- Toner / printer ink cartridges<br>-- Folders, notebooks<br>-- Miscellaneous supplies |                 |
| ▪ Copier charges  |                 |
| ▪ Email charges   |                 |
| ▪ Key copy expenses   |                 |
| ▪ Postage   |                 |
| ▪ Overnight delivery charges  |                 |
| ▪ Runner/courier/field coordinator fees   |                 |
| ▪ Other   |                 |
| <b>EQUIPMENT</b>  |                 |
| ▪ Computer(s)   |                 |
| ▪ Printer(s)  |                 |
| ▪ Software/software license fees  |                 |
| ▪ Camera(s)   |                 |
| ▪ Equipment repair/maintenance  |                 |
| ▪ Lock Boxes, E-key devices   |                 |
| ▪ Other   |                 |
| <b>VEHICLE EXPENSES</b>   |                 |
| ▪ Monthly payment   |                 |
| ▪ Gasoline  |                 |
| ▪ Insurance   |                 |
| ▪ Maintenance and repairs   |                 |
|   |                 |

| Category                                      | Monthly Expense |
|---|-----------------|
| <b>WEBSITE EXPENSES</b>                       |                 |
| ▪ Realtor.com charges/fees                    |                 |
| ▪ Personal website charges/fees               |                 |
| ▪ Other website(s) charges/fees               |                 |
| <b>ADVERTISING AND MARKETING</b>              |                 |
| ▪ Texting/QR Code fees                        |                 |
| ▪ Professional photographer/videographer fees |                 |
| ▪ Signs and riders                            |                 |
| ▪ Brochures                                   |                 |
| ▪ Printing                                    |                 |
| ▪ Business cards                              |                 |
| ▪ Routine mailings                            |                 |
| ▪ Special mailings                            |                 |
| ▪ Newsletters                                 |                 |
| ▪ Newspaper advertising                       |                 |
| ▪ Magazines/publications advertising          |                 |
| ▪ Other advertising/social media ads          |                 |
| <b>PROFESSIONAL EXPENSES</b>                  |                 |
| ▪ Board dues                                  |                 |
| ▪ License fees                                |                 |
| ▪ MAPS coaching and training                  |                 |
| ▪ MAPS events and travel                      |                 |
| ▪ Books/professional materials                |                 |
| ▪ Other course fees                           |                 |
| ▪ E & O Insurance                             |                 |
| ▪ Other professional expenses                 |                 |
| <b>STAFF EXPENSES</b>                         |                 |
| ▪ Salaries                                    |                 |
| ▪ FICA  |                 |
| ▪ Worker's compensation insurance             |                 |
| ▪ Health insurance                            |                 |
| ▪ Other staff expenses                        |                 |
| <b>TOTAL MONTHLY EXPENSES</b>                 |                 |

**Corrective Action Report**

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

To: \_\_\_\_\_

**EMPLOYEE'S NAME**

You have been issued this written warning for:  performance issues  personal conduct issues

suspension  demotion

Corroborating Facts (Be specific regarding the circumstances involved):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

You are expected to make the following improvements by the indicated date or dates:

\_\_\_\_\_  
\_\_\_\_\_

In case of future, or in consideration of current performance deficiencies or personal conduct issues, you will be subject to the following actions:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please note that your personal file contains previous corrective actions as follows:

\_\_\_\_\_/\_\_\_\_\_  
**(Date/Type of corrective action)**

\_\_\_\_\_/\_\_\_\_\_  
**(Date/Type of corrective action)**

**I have read the information on the Corrective Action Report, discussed the subject(s) with my supervisor, and understand the corrective action(s) required of me.**

\_\_\_\_\_  
**EMPLOYEE SIGNATURE**

\_\_\_\_\_  
**DATE**

\_\_\_\_\_  
**SUPERVISOR SIGNATURE**

\_\_\_\_\_  
**DATE**

## 90- Day Evaluation Period

### Objective:

- To provide training and a “getting acquainted” period during which the employee and (agent’s name and company name) \_\_ may determine whether further employment with (agent’s name and company name) \_ is appropriate.

### Description:

- New employees hired into full-time and part-time regular positions, as well as those employees who transfer from one position to another are subject to a 90-day evaluation period, commencing from their first date of employment. During this period, the employer and the employee have an opportunity to evaluate one another and the employee’s performance ability and interest in the job.

The employer or employee may terminate the employment relationship at will, at any time during or after the 90-day evaluation period with or without cause or advance notice.

### Extensions:

- (Agent’s name and company name) \_\_ reserves the right to extend the duration of the evaluation period when such an extension is determined appropriate at the employer’s sole and absolute discretion.

### Performance Evaluation:

- A performance evaluation will be conducted upon completion of, or at any time during, the 90-day evaluation period. The intent of the performance- only evaluation is to provide feedback on employee progress in relation to standards established for the employee’s position and areas of responsibility.

### Completion:

- Employees who successfully complete the 90-day evaluation period are notified of their change from introductory to regular full-time or regular part-time employee status in writing.

\*The next 2 forms are for you and your agent to fill out...each of you complete the appropriate evaluation form and then meet and compare your results.

**Rating Form/90 Day Evaluation**

(Agent to complete)

**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*Rate on a scale of 1–10.*

- \_\_\_ 1. The employee completes assignments and tasks as requested.
- \_\_\_ 2. Handles customers in a professional manner.
- \_\_\_ 3. Handles all calls professionally in a timely and courteous manner and with energy and enthusiasm
- \_\_\_ 4. Arrives at work on time and prepared for the day.
- \_\_\_ 5. Satisfactory attendance.
- \_\_\_ 6. Follows company policy and procedures.
- \_\_\_ 7. Takes initiative.
- \_\_\_ 8. Handles all paperwork efficiently and meets deadlines.
- \_\_\_ 9. Works well with the office and agents.
- \_\_\_ 10. Keeps the agent on schedule.
- \_\_\_ 11. Manages office systems. CANI
- \_\_\_ 12. Answers the phone timely and courteously with energy and enthusiasm.
- \_\_\_ 13. Focused on building clients for life using great customer experience.
- \_\_\_ 14. Independently anticipates challenges and solves problems.
- \_\_\_ 15. Handles all information confidentially.
- \_\_\_ 16. Positive attitude at all times.

A. The assistant has shown improvement on the following: \_\_\_\_\_

B. The following areas need improvement: \_\_\_\_\_

\_\_\_\_\_  
Assistant Signature

\_\_\_\_\_  
Agent Signature



## Rating Form/90 Day Evaluation

(Assistant to complete)

**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*Rate on a scale of 1–10.*

- \_\_\_ 1. I complete assignments and tasks as requested.
- \_\_\_ 2. I handle customers in a professional manner.
- \_\_\_ 3. I handle all calls professionally in a timely and courteous manner and with energy and enthusiasm
- \_\_\_ 4. I arrive at work on time and prepared for the day.
- \_\_\_ 5. I have satisfactory attendance.
- \_\_\_ 6. I follow company policy and procedures.
- \_\_\_ 7. I take initiative.
- \_\_\_ 8. I handle all paperwork efficiently and meets deadlines.
- \_\_\_ 9. I work well with the office and agents.
- \_\_\_ 10. I keep the agent on schedule.
- \_\_\_ 11. I manage our office systems. CANI
- \_\_\_ 12. I answer the phone timely and courteously with energy and enthusiasm.
- \_\_\_ 13. I am focused on building clients for life using great customer experience.
- \_\_\_ 14. I independently anticipate challenges and solves problems.
- \_\_\_ 15. I handle all information confidentially.
- \_\_\_ 16. I always have a positive attitude.

A. The assistant has shown improvement on the following: \_\_\_\_\_

B. The following areas need improvement: \_\_\_\_\_

\_\_\_\_\_  
Assistant Signature

\_\_\_\_\_  
Agent Signature



## Common Myths about Assistants

**Myth #1:** Assistants are paper pushers and message takers.

**Reality:**

You are everything...you are the keeper of the culture, communications, transactions, customer service...everything

**Myth #2:** Assistants should just focus on making the office run more smoothly.

**Reality:**

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**Myth #3:** When an Assistant puts a good system in place, the system should just run itself – no tinkering is needed.

**Reality:**

CANI/constant and never-ending improvement every quarter

**Myth #4:** Mind reader.

**Reality:**

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**Myth #5:** Assistant keeps Agent on track 100% of the time.

**Reality:**

Not really...if you know their schedule and can see they are off track, be a good business partner and remind them of the importance of keeping to their schedule



## Things Every Agent Wants from Their Assistant

1. Bring one referral a month.
2. Always come to work on time or be early.
3. Show your enthusiasm and be positive.
4. Be a great communicator and ask questions.
5. Demonstrate excellent telephone/computer skills, return messages promptly.
6. Know the clients and know the files.
7. Keep the agent on track.
8. Know the goals.
9. Know the deadlines.
10. Watch all expenses.
11. Bring an efficiency idea to the team.
12. Bring money-saving ideas.
13. Database...keep it efficient and up-to-date.
14. Know how and when to present ideas (and when to discuss problems); timing is everything.
15. Be the “keeper of the culture”.



## Assistant Self-Evaluation

1. How did you pay for yourself?
2. How did you develop goals?
3. How did you become CEO of your job?
4. How did you make your agent look good?
5. Who relied on you?
6. What additional jobs did you accept that made others' jobs easier?
7. What extra items did you do this month?
8. Was your listing package successful?
9. What did you do to guarantee a customer for life?
10. If you were the president of this group, what would you do differently?
11. What is one money-making idea for this company for cutting expenses?
12. What is one money-making idea for this company for increasing income?

## Implementation System

This system maximizes your success when implementing new systems in your office.

1. Meet with your agent and identify all the systems you need to add or improve.
2. List, in terms of importance, only two projects per month. If it is the 15th and they are completed, naturally go on to the next system.
3. Do not implement more than one system at a time.
4. Do not start ANY NEW SYSTEMS UNTIL THE FIRST IS COMPLETED.
5. One person is the point person/lead if others are involved.
6. CHECKPOINTS ARE A MUST!
7. It is okay to move the deadline.

Here is an example of month 1 to get you started:

### January

#### System Improvement Project Number 1: Database Cleanup

**Purpose:** To get all phone numbers and emails of the current (amount) in the database cleaned up so we can move forward with an excellent foundation to increase and improve the quality of information.

1. Start Date: January 5, 20\_\_
2. End Date: February 1, 20\_\_
3. Who will be involved?
4. Steps
  - a. Create a script
  - b. Role-play the script
  - c. Divide the database
  - d. Schedule 15 calls/vm per day
  - e. Verify all information with client
  - f. Use Monica's "Disney" Close and ask for referrals
  - g. If you left a message, schedule to call again

## System Improvement Project Number 2: Prelist Package

**Purpose:** To Improve our Prelist Package and System

1. Start Date: January 7, 20\_\_ \_\_
2. End Date: January 25, 20\_\_ \_\_
3. Who will be involved?
4. Steps
  - a. Review current package
  - b. Check with other agents and samples to compare
  - c. What is missing
  - d. What can be eliminated
  - e. Analyze delivery system
  - f. Is the package professional



## Assistant Systems for Success Worksheet: 10 Ideas

Use this worksheet to help you and your team decide what to implement and when

**Idea #1:** \_\_\_\_\_

Timeframe: \_\_\_\_\_

How to Implement:

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**Idea #2:** \_\_\_\_\_

Timeframe: \_\_\_\_\_

How to Implement:

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**Idea #3:** \_\_\_\_\_

Timeframe: \_\_\_\_\_

How to Implement:

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**Idea #4:** \_\_\_\_\_

Timeframe: \_\_\_\_\_

How to Implement:

\_\_\_\_\_  
\_\_\_\_\_

**Idea #5:** \_\_\_\_\_

Timeframe: \_\_\_\_\_

How to Implement:

\_\_\_\_\_  
\_\_\_\_\_

**Idea #6:** \_\_\_\_\_

Timeframe: \_\_\_\_\_

How to Implement:

\_\_\_\_\_  
\_\_\_\_\_

**Idea #7:** \_\_\_\_\_

Timeframe: \_\_\_\_\_

How to Implement:

\_\_\_\_\_  
\_\_\_\_\_



**Idea #8:** \_\_\_\_\_

Timeframe: \_\_\_\_\_

How to Implement:

\_\_\_\_\_  
\_\_\_\_\_

**Idea #9:** \_\_\_\_\_

Timeframe: \_\_\_\_\_

How to Implement:

\_\_\_\_\_  
\_\_\_\_\_

**Idea #10:** \_\_\_\_\_

Timeframe: \_\_\_\_\_

How to Implement:

\_\_\_\_\_  
\_\_\_\_\_

The Five “Fs”



**FAITH**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_



**FITNESS**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_



**FAMILY**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_



**FINANCES**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_



**FUN**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

# Growth Plan

Name \_\_\_\_\_

Year \_\_\_\_\_

List up to 3 professional and personal growth-minded activities per month. Examples include books to read, courses to take, events to attend, etc.

| Month    | Professional Activities  | Personal Activities |
|----------|--------------------------|---------------------|
| January  | 1.                       | 1.                  |
|          | 2.                       | 2.                  |
|          | 3.                       | 3.                  |
| February | 1. Attend Family Reunion | 1.                  |
|          | 2.                       | 2.                  |
|          | 3.                       | 3.                  |
| March    | 1.                       | 1.                  |
|          | 2.                       | 2.                  |
|          | 3.                       | 3.                  |
| April    | 1.                       | 1.                  |
|          | 2.                       | 2.                  |
|          | 3.                       | 3.                  |

# Growth Plan

Name \_\_\_\_\_

Year \_\_\_\_\_

List up to 3 professional and personal growth-minded activities per month. Examples include books to read, courses to take, events to attend, etc.

| Month  | Professional Activities | Personal Activities |
|--------|-------------------------|---------------------|
| May    | 1.                      | 1.                  |
|        | 2.                      | 2.                  |
|        | 3.                      | 3.                  |
| June   | 1.                      | 1.                  |
|        | 2.                      | 2.                  |
|        | 3.                      | 3.                  |
| July   | 1.                      | 1.                  |
|        | 2.                      | 2.                  |
|        | 3.                      | 3.                  |
| August | 1.                      | 1.                  |
|        | 2.                      | 2.                  |
|        | 3.                      | 3.                  |

# Growth Plan

Name \_\_\_\_\_

Year \_\_\_\_\_

List up to 3 professional and personal growth-minded activities per month. Examples include books to read, courses to take, events to attend, etc.

| Month     | Professional Activities | Personal Activities |
|-----------|-------------------------|---------------------|
| September | 1.                      | 1.                  |
|           | 2.                      | 2.                  |
|           | 3.                      | 3.                  |
| October   | 1.                      | 1.                  |
|           | 2.                      | 2.                  |
|           | 3.                      | 3.                  |
| November  | 1.                      | 1.                  |
|           | 2.                      | 2.                  |
|           | 3.                      | 3.                  |
| December  | 1.                      | 1.                  |
|           | 2.                      | 2.                  |
|           | 3.                      | 3.                  |

**Policy and Procedures Tab Suggestions**

1.

2.

3.

**What I Learned Today ...**

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## Note from Monica ...

Congratulations! You have graduated from the Keller Williams MAPS Coaching Perfect Real Estate Assistant Course. It is my “ONE Thing” to teach this class and give you the tools you need to be successful. This course only works because you are implementing its lessons at a high level.

You now have a blueprint to become the top assistant/team in your market. You are on the road to being truly world class.

I would like to personally thank you for attending the class and for all your hard work. I look forward to meeting you in the future. If you would like to continue improving your systems for training, motivating, and retaining a talented assistant, please consider joining again for the next class. Also, look at the MAPS Coaching website for additional education opportunities.

*Thank you for the privilege,*

*Monica*

[Monica@kw.com](mailto:Monica@kw.com)