SHIFT into Overdrive:
Tactics to Succeed Now

The Few Who Choose and the Choices They Make

Name: _______________________________________

Date: ________________________________________
Acknowledgments

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Jennifer Boyd    Tony DiCello    Roger Higle    Jay Papasan    Jeff Ryder
Mike Brodie      Dick Dillingham Dave Jenks    Dean Poole    Dawn Sroka
Mona Covey       Rick Geha       Gary Keller    Gene Rivers

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# Agenda for the Day

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<thead>
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<th>SHIFT Tactic</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHIFT Tactic #4 and #5</td>
<td>Lead Generation and Lead Conversion</td>
</tr>
<tr>
<td>SHIFT Toolkit</td>
<td>Leveraging Technology</td>
</tr>
<tr>
<td>SHIFT Tactic #7</td>
<td>Price Ahead of the Market</td>
</tr>
<tr>
<td>SHIFT Tactic #9</td>
<td>Create Urgency</td>
</tr>
</tbody>
</table>

**Lunch Break**

| SHIFT Tactic #11             | Market of the Moment Panel Discussion of the Local Market with Local Expert Panel |

Smart Money
In This Section:
Check Your Attitude—It’s Everything!
Get Real!
The Truth: Know It!
Focus on Income—Yours!
Are You Ready to Shift?
This Year Will Define Your Career!
Check Your Attitude—It’s Everything!

“Whether you think you can or can’t, you’re right.”

Henry Ford

“We are what we decide we will be, and we do what we decide we will do. We become our choices.”

SHIFT: How Top Real Estate Agents Tackle Tough Times

“When a market shifts there is only one thing to do—shift with it. In truth, there are two shifts you must make. A mental shift and an action shift.”

SHIFT: How Top Real Estate Agents Tackle Tough Times

“The challenge for individual agents? Fear, and how they will respond to it ... some individuals, though they do feel the fear, also know they are in an equal opportunity, unequal reward business.”

SHIFT: How Top Real Estate Agents Tackle Tough Times

“If you can shift gears—shifting both your thinking and your tactics—you will accelerate ahead of the rest.”

SHIFT: How Top Real Estate Agents Tackle Tough Times

“In the era of extra, you get to keep your job; in the era of average, you get laid off.”

Gary Keller

“2009 is a time of pain or a time of gain.”

Gene Rivers, Tallahassee, Florida
Get Real!

How Do You Get Out of Being Stuck in the Middle?

Complete Failure  Average  Massive Success

Most People
The Truth—Know It!

Know the Truth about Your Market

1. Unit Sales _____________________
2. Median Sales Price _____________________
3. Current Interest Rate _____________________
4. Absorption rate data, by price range, showing trends for last quarter.
   • What price ranges are selling best?
     ____________________________________________
     ____________________________________________
   • What are sellers’ chances of selling in the best-performing and worst-performing ranges?
     ____________________________________________
     ____________________________________________
5. Affordability _____________________
6. Foreclosure Rate _____________________
Focus on Income—Yours!

Your GCI:
What is the possibility?

What it will take to make more money

- 5 more listings per year = 10 more sales per year
- Every sold listing produces another sale
- If average commission is $5,000 = $50,000!
This Year Will Define Your Career!

“Success never comes to the chosen few, but to the few who choose.”

Gary Keller, SHIFT

Are You Ready to Shift?

“You must persevere and find a way to win.”

Gary Keller, SHIFT
In This Section:

Why Two Tactics Become One

Prospecting Based and Marketing Enhanced

It’s 9:00 a.m.—Lead Generation ONLY

The Six Core Competencies—the Two You Must Do

Your Lead Source Zone

Your Database: Focus on Advocates

Stay in Touch—33 Touch Accelerator

Lead Conversion Best Practices

Action Step
Why Two Tactics Become One

**Increase in appointments**

= more $$

\[
\begin{align*}
\text{___________ more appointment(s) per month} \\
= \text{___________ more per year} \\
x \text{___________ % that become closed contracts (NAR)} \\
= \text{___________ closed units (___Listings, ____Buyers)} \\
x \text{___________ average commission} \\
= \text{___________ GCI} \\
+ \text{___________ from the listings that produce buyer sales} \\
\end{align*}
\]

Net result $\text{___________}$ !

How does this number compare with your desired GCI?

“We can evade reality, but we cannot evade the consequences of evading reality.”

Ayn Rand, Author
“Prospecting tends to uncover motivated leads faster and keeps you more in control. Because prospecting puts you in immediate contact with people, you get immediate feedback—and that’s what you want in a shifted market.”

Gary Keller, SHIFT

The automated 12 Direct, 8 x 8 and 33 Touch action plans in the Keller Williams version of TOP PRODUCER include a variety of print and email marketing options, phone call reminders, and a robust contact record to store notes and other important information.
It’s 9:00 a.m.—Lead Generation ONLY

Time Block – Three Things for Success

1. Time off/Vacation
2. Lead Generation Time
3. Planning Time

Time Blocking Three Things for Success

<table>
<thead>
<tr>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
<th>Sunday</th>
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<tbody>
<tr>
<td>Notes</td>
<td>1: 8:30 to 11:30am Lead Generation</td>
<td>2: 8:30 to 11:30am Lead Generation</td>
<td>3: 8:30 to 11:30am Lead Generation</td>
<td>4: 8:30 to 11:30am Lead Generation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8:00 to 9:00am</td>
<td>Planning 9:00 to 12:00am Lead Generation</td>
<td>8: 8:30 to 11:30am Lead Generation</td>
<td>9: 8:30 to 11:30am Lead Generation</td>
<td>10: 8:30 to 11:30am Lead Generation</td>
<td>11: 8:30 to 11:30am Lead Generation</td>
<td></td>
</tr>
<tr>
<td>14:00 to 9:00am</td>
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<td>15: 8:30 to 11:30am Lead Generation</td>
<td>16: 8:30 to 11:30am Lead Generation</td>
<td>17: 8:30 to 11:30am Lead Generation</td>
<td>18: 8:30 to 11:30am Lead Generation</td>
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</tr>
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<td>21:00 to 9:00am</td>
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<td>22: 8:30 to 11:30am Lead Generation</td>
<td>23: 8:30 to 11:30am Lead Generation</td>
<td>24: 8:30 to 11:30am Lead Generation</td>
<td>25: 8:30 to 11:30am Lead Generation</td>
<td></td>
</tr>
<tr>
<td>28:00 to 9:00am</td>
<td>Planning 9:00 to 12:00am Lead Generation</td>
<td>29: 8:30 to 11:30am Lead Generation</td>
<td>30: 8:30 to 11:30am Lead Generation</td>
<td>31: 8:30 to 11:30am Lead Generation</td>
<td>Notes</td>
<td></td>
</tr>
</tbody>
</table>

Three Things Done in Three Hours of Lead Generation Time

1. P ____________________________
2. T ____________________________
3. M ____________________________
The Six Core Competencies—the Two You Must Do

1. **Lead generate, capture and convert.**
2. Present to buyers and get agreements.
3. Show buyers and market seller.
4. Write and negotiate contracts.
5. Coordinate the sale to closing.
6. **Manage the money.**

“What am I doing or spending money on that is no longer effective since the market shifted?”

Gary Keller, *SHIFT*
“Leads cost us money, so we really do need to hold each one accountable.”

Jana Caudill, Crown Point, Indiana
Did you know it takes up to six times more energy to do business with a stranger vs. someone you already know? Build your Have Met database using the Keller Williams version of TOP PRODUCER: LivePost and Market Snapshot to manage email, postcard, and letter marketing plans.

Your Database: Focus on Advocates

Who are your best advocates?

________________________________________
________________________________________
________________________________________

“Your number one job as a real estate agent is to get in the path of motivated buyers and sellers.”

Gary Keller, SHIFT
Stay in Touch—33 Touch Accelerator

Two Emails and One Call per Month

<table>
<thead>
<tr>
<th></th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
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<tbody>
<tr>
<td>Email 1st of Month</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
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<td>1</td>
</tr>
<tr>
<td>Email 15th of Month</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
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<td>1</td>
<td>1</td>
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<tr>
<td>Calls</td>
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<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

Look for the new SHIFT 33 Touch Accelerator action plan in the Keller Williams edition of TOP PRODUCER. Combined with Market Snapshot, this plan combines two response-oriented emails and one phone call reminder each month. For postcard marketing, use LivePost to print and mail directly from your computer.
The Power of the 33 Touch

\[ \text{Contacts in Database} \times \text{Touches in a Year} = \text{Touches} \]
\[ \text{Touches} \times \text{Contracts from Contacts} = \text{Contracts} \]
\[ \text{Contracts} \times \text{Average Commission} = \text{GCI} \]

*Note: If you need a review of the 33 Touch action plan, learn more from *The Millionaire Real Estate Agent* and many of Keller Williams University’s courses.

The Keller Williams version of TOP PRODUCER and Market Snapshot combine for a quick and easy automated 33 Touch program.
Lead Conversion Best Practices

1. Connect to establish motivation.

2. Deliver the right message for the market.

3. Stay in curiosity with questions.

4. Come from contribution—make offers for immediate response.

5. Ask for the order and close.
What do you need to do now to shift your lead generation and conversion?

1. 

2. 

3. 

Identify Your Critical Actions
In This Section:

Get Comfortable with the Truth
Three Truths About Sellers
The Window of Opportunity
Don’t Chase the Market Down
Be in the Market by Pricing Ahead of the Market
Market Data on Price and Units Sold
Pricing Best Practices
Action Step
Get Comfortable with the Truth

- Rethink the way you price.
- Know that price shifts are happening fast.
- Acknowledge the pent-up demand in most markets.
  — 5 million properties will sell in 2009.
  — 30-ish buyers may buy 5-6 more times

“...exposes
and magnifies the classic real
estate price conflict that has always existed:
the asking price a seller wants versus the price a
buyer is willing to pay.”

Gary Keller, SHIFT

Home Prices in Thousands

The median home price declined by 9% in 2008.

20-year historical appreciation rate = 4%
Mortgage Rates 30-Year Fixed

- Mortgage rates remained low for most of 2008 at around 6%.
- Mortgage rates ended the year at 5.1%, an all-time low since Freddie Mac started its mortgage survey in 1971.

Three Truths About Sellers

1. Sellers must decide if they really ____________________
   ______________________________________________________

2. Your job as an agent is to _____________________________
   ______________________________________________________

3. Once they see and hear the truth, _______________________
   ______________________________________________________

“There is a gap between what a seller thinks and the realistic price they can get. That gap is where your skills must work.”

Gary Keller, SHIFT
The Window of Opportunity

- Price It Right—you’re in the market
- Price It Wrong—you’re out of business

Local Factors Affecting Price

Price Reductions

1. Know and communicate chances of selling.
2. Know you’re on target.
3. Drop x% every x days—contract it.
4. Use a bracketing strategy.
5. Deliver traffic.

“The first time someone sees a property is called the ‘window of opportunity’ because it is the single best chance to create the impression that will sell the house. It’s the best marketing message a seller can send: We’re priced right and serious to sell.”

Gary Keller, SHIFT
Don’t Chase the Market Down

“Not chasing the market means pricing your listings ahead of it.”

Gary Keller, SHIFT
Be in the Market by Pricing Ahead of the Market
**Market Data on Price and Units Sold**

Major Market Study of Price Decline and Units Sold

<table>
<thead>
<tr>
<th>Statewide &amp; Metropolitan Statistical Areas (MSAs)</th>
<th>Realtor Sales</th>
<th>Median Sales Price</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Year End 2008</td>
<td>Year End 2007</td>
</tr>
<tr>
<td>STATEWIDE*</td>
<td>124,215</td>
<td>129,855</td>
</tr>
<tr>
<td>Fort Lauderdale</td>
<td>6,377</td>
<td>6,127</td>
</tr>
<tr>
<td>Fort Myers-Cape Coral</td>
<td>8,217</td>
<td>5,753</td>
</tr>
<tr>
<td>Fort Pierce-Port St. Lucie</td>
<td>4,332</td>
<td>3,376</td>
</tr>
<tr>
<td>Gainesville</td>
<td>1,925</td>
<td>2,644</td>
</tr>
<tr>
<td>Jacksonville</td>
<td>9,866</td>
<td>12,341</td>
</tr>
<tr>
<td>Orlando</td>
<td>16,659</td>
<td>17,143</td>
</tr>
<tr>
<td>Panama City</td>
<td>1,054</td>
<td>1,364</td>
</tr>
<tr>
<td>Pensacola</td>
<td>3,208</td>
<td>4,188</td>
</tr>
<tr>
<td>Punta Gorda</td>
<td>2,530</td>
<td>2,436</td>
</tr>
<tr>
<td>Sarasota-Bradenton</td>
<td>7,661</td>
<td>8,013</td>
</tr>
<tr>
<td>Tallahassee</td>
<td>2,099</td>
<td>2,779</td>
</tr>
<tr>
<td>Tampa-St. Petersburg-Clearwater</td>
<td>23,615</td>
<td>24,310</td>
</tr>
<tr>
<td>West Palm Beach-Boca Raton</td>
<td>6,953</td>
<td>6,971</td>
</tr>
</tbody>
</table>

“The best way to truly serve a seller in a shift is to persuade them to outthink the other sellers they must compete against.”

Gary Keller, *SHIFT*
Pricing Best Practices

1. Study the market constantly.

2. Focus comps on actives.

3. Be a student of property.


5. Prequalify sellers.


7. Secure price reductions in advance.

Buyers can use Market Snapshot to keep current with home activity in specific neighborhoods. Community and school data is also included to help buyers research and compare multiple neighborhoods.
Identify Your Critical Actions

What do you need to do now to revamp your pricing strategies?

1. ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________

2. ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________

3. ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________
Presenter(s):

1. __________________________________________

2. __________________________________________
In This Section:

A Real Lead is a Motivated Lead
Qualify—Able, Ready, and Willing
Energize Buyer Urgency
Overcome Reluctance
Timing the Market Doesn’t Work
The Safe Zone
Why Wait—The Cost of Waiting to Buy
Affordability
First-Time Home Buyers
Seller Urgency
Action Step
“A buyers’ market should be just that—a buyers’ market ... You must help buyers rediscover a sense of urgency.”

Gary Keller, *SHIFT*

**A Real Lead is ... a Motivated Lead**

“A market shift simply causes a smaller number of buyers and sellers to have the ability, readiness or willingness ... this is why you must now ramp up your lead generation, because there are less of the motivated to find.”

Gary Keller, *SHIFT*

Never lose another lead! The Leads Manager portion of the Keller Williams version of TOP PRODUCER keeps leads at your fingertips and regularly reminds you when to followup.
Qualify—Able, Ready, and Willing

Energize Buyer Urgency

1. Be the local economist for both buyers and sellers.
2. Help them see their Big Why.
3. Address any reluctance.

Overcome Reluctance

1. Why Wait—hazards of timing the market
2. Trade Up—opportunity of a down market
3. Less Is More—narrow the field
4. Find a Best Buy—get while the gettin’s good
Timing the Market Doesn’t Work

— Points of Realization:
“The Market has Shifted!”
The Safe Zone

“People who buy in a buyers’ market are the smart ones. They’re buying in the safe zone and living in the area of certainty.”

Gary Keller, *SHIFT*
Why Wait—The Cost of Waiting to Buy

The Keller Williams version of TOP PRODUCER includes dozens of new SHIFT-inspired postcards, email, and letters including “best buy,” “trade up,” and “Why wait” themes. Each postcard uses LivePost to save time and money.

<table>
<thead>
<tr>
<th>Scenario 1:</th>
<th>Scenario 2:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home Price</strong>: -5%</td>
<td><strong>Home Price</strong>: -10%</td>
</tr>
<tr>
<td>$200,000</td>
<td>$180,000</td>
</tr>
<tr>
<td><strong>Interest Rate</strong>: +0.5%</td>
<td><strong>Interest Rate</strong>: +1.0%</td>
</tr>
<tr>
<td>6.5%</td>
<td>7.0%</td>
</tr>
<tr>
<td><strong>Payment</strong>:</td>
<td><strong>Payment</strong>:</td>
</tr>
<tr>
<td>$1,199</td>
<td>$1,198</td>
</tr>
</tbody>
</table>
First-Time Home Buyers

• First-time home buyers are now more than ______% of all buyers.
• They have 8,000 reasons to buy now.
• Use the resource Your First Home.

Seller Urgency

Truth: ____________________________

Truth: ____________________________

Truth: ____________________________

Truth: ____________________________
Identify Your Critical Actions

What do you need to do now to create urgency with buyers and sellers?

1. ____________________________________________
   ____________________________________________
   ____________________________________________

2. ____________________________________________
   ____________________________________________
   ____________________________________________

3. ____________________________________________
   ____________________________________________
   ____________________________________________
In This Section:

Three Markets of the Moment
The Opportunity Is Never Over
Get Educated—Latest Distressed Market Tools
Your Market of the Moment Decision
Focus: The Buyer Side of Distressed Properties
Focus: Short Sales Opportunity
Focus: REO Listing Opportunity
Action Step
Three Markets of the Moment

1. Distressed Properties
   - Foreclosures
     - Bargain hunters and investors seeking to buy value
   - Short Sales
     - Individuals or families trying to avoid foreclosure
   - REOs
     - Financial institutions with an above-average number of foreclosures to sell

2. First-time Home Buyers

3. Investors

"Don’t hesitate—there is a definite advantage that goes to those who move first. The sooner you get involved, the better. Whether you completely dive into these opportunities or not, they are worth studying and mastering."

Gary Keller, *SHIFT*
The Opportunity Is Never Over

It’s Your Choice

- Learn as much as possible about these markets and what it takes to “play” in them.
- Decide if this business is for you.
- Specialize in one of the three.
- Know where to get help and resources.
- Look ahead to the next shift.

An increasing proportion of today’s residential real estate market consists of distressed properties such as REO and short sales—50 percent nationwide and up to 90 percent in some areas of Nevada and California. (source: Campbell Communications 2009)

In some markets, distressed properties may be from 10–90 percent of your opportunity.
Get Educated—Latest Distressed Market Tools

- KW Foreclosure Search Feature
- KWConnect
- Agent Mountain
- KW Distressed Property Network
- KWU Distressed Property Boot Camp (June 2009)
- Mega Camp
- Masterminds
- Family Reunion
- MAPS Short Sale Coaching
- “Seven-Figure REO Agent” Course

Your Market of the Moment Decision

“A market shift can be a moment of truth for your career. You will be faced with the decision to go after homes in default, foreclosure, and REOs ... and shouldn’t be a spur-of-the-moment decision.”

Gary Keller, SHIFT
Focus: The Buyer Side of Distressed Properties

Focus: Short Sales Opportunity

Focus: REO Listing Opportunity
Action Step

Identify Your Critical Actions

What do you need to do now to make the most of the market of the moment?

1. ____________________________________________
   ____________________________________________
   ____________________________________________

2. ____________________________________________
   ____________________________________________
   ____________________________________________

3. ____________________________________________
   ____________________________________________
   ____________________________________________
Market of the Moment—Local Expert Panel

Local Experts:

1. ____________________________
2. ____________________________
3. ____________________________
4. ____________________________
5. ____________________________
6. ____________________________
Presenter(s):

1. ___________________________________________

2. ___________________________________________
Smart Money Management

In This Section:

The Six Core Competencies—the Two You Must Do
Overcome Your Discomfort Now—Know Your Numbers
Know Where Your Profit Comes From
Invest Wisely—Know Where Your Money Goes
Action Step
The Six Core Competencies—
the Two You Must Do

1. **Lead generate, capture, and convert.**

2. Present to buyers and get agreements.

3. Show buyers and market seller.

4. Write and negotiate contracts.

5. Coordinate the sale to closing.

6. **Manage the money.**

   “I’ve come to think of money as being about having choices.”
   
   Gary Keller

Overcome Your Discomfort Now—
Know Your Numbers

- Think “money matters.”
- Fill out a standard bank loan application on yourself every month.
- Create a budget that matches your revenue.
- Check your budget weekly/monthly.
Know Where Your Profit Comes From

- Find your profit and protect it!
- Use *The Millionaire Real Estate Agent* Chart of Accounts.
- Generate revenue by generating leads.

### Know these numbers

- GCI ______________
- Unit sales ______________
- Median sales price ______________
- Conversion ratios ______________
  - Leads to appointment ______________
  - Appointments to signed agreement _______
  - Agreements to contract ______________
  - Contracts to closed units ______________

The Keller Williams version of TOP PRODUCER helps track important numbers, such as leads per source and closings per source, as well as tracking team member activities including calls and appointments.
Invest Wisely—
Know Where Your Money Goes

• Every expense is an investment in your business.

• Track expenses—every expense should be for a specific and measureable result.

“\(^\text{“No matter the market you always follow the philosophy of ‘lead with revenue.’”}\)

Gary Keller, SHIFT
# Know Your Net Worth

## Personal Balance Sheet

<table>
<thead>
<tr>
<th></th>
<th>Jan. 1, Last Year</th>
<th>Jan. 1, This Year</th>
<th>Annual % Increase</th>
<th>Current Total</th>
<th>YTD % Increase</th>
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<tbody>
<tr>
<td><strong>Assets</strong></td>
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</tr>
<tr>
<td>Retirement Accounts</td>
<td>$</td>
<td>$</td>
<td>%</td>
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<td>%</td>
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<td>Equity Investments</td>
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<td>$</td>
<td>%</td>
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</table>

From *The Millionaire Real Estate Investor*
Identify Your Critical Actions

What do you need to do now to manage your money smartly?

1. ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

2. ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

3. ________________________________________________________________
   ________________________________________________________________
Your Action Steps Review

In This Section:
Review Your Action Steps and Prioritize
Choose Your #1
Review Your Action Steps and Prioritize

1. 
2. 
3. 
4. 
5. 
6. 

Choose Your #1

- Choose your #1 priority action.
- Share with a neighbor.
- Shout out.

<table>
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<th>Focus</th>
<th>Action Step</th>
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<td>First Priority</td>
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</table>

Master the first step before adding another!
In This Section:

Accountability

MAPS Coaching Programs
Accountability

I do/
I will
☐ 1. Personal accountability with the 4-1-1
☐ 2. Partner or group accountability
☐ 3. Ultimate accountability—Coaching

MAPS Coaching Programs

Fast Track: ________________________________

Power Play: ______________________________

Breakthrough: __________________________

Mastery: ________________________________

“For whatever you want, set up accountability for it.”

Gary Keller, SHIFT
2009 Is “Do It Time”

In This Section:
1. Choose Your Direction
2. Know Your Numbers
3. Learn the Truth ... Tell the Truth
4. Be Accountable
2009 Is “Do It Time”

1. Choose Your Direction

2. Know Your Numbers

3. Learn the Truth … Tell the Truth

4. Be Accountable