

# BECOMING A LEGACY AGENT



COMPANION WORKBOOK



# Welcome to Your *Becoming a Legacy Agent* Companion Workbook

This workbook will give you the space to complete the exercises designed to help reignite your journey in real estate. I understand where you are because I've been there before, and I'm just one tiny step ahead of you in the process. So, let's lock arms and dive in with an open heart and mind so you can unlock the badass Legacy Agent within you.

# *Chapter 1*

Things Nobody Told  
You about Being a  
Real Estate Agent

1. In what ways did this chapter change your perspective on your role as a REALTOR?

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2. What are some of the emotions that you're currently experiencing in your business and with your clients?

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3. What "chief" roles are you currently playing in your business?

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4. What “chief” roles are you missing within your business?

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5. What roles in your business bring you joy and satisfaction?

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6. What roles do you have that you’re not qualified for and someone could do better?

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7. What things aren't being done in your business as a result of playing too many roles in your business?

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8. How does the mindset shift from REALTOR to CEO make you view your business differently?

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9. What skills and training do you need to become the CEO of your business?

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## *Chapter 2*

# The Foundations of a Healthy, Successful Agent

Rank the following areas of your life on a scale of 1 to 10 (10 being best):

Career/Business #  
\_\_\_\_\_

Finances/Wealth #  
\_\_\_\_\_

Personal Development #  
\_\_\_\_\_

Love/Marriage/Relationships #  
\_\_\_\_\_

Friends/Family #  
\_\_\_\_\_

Health/Fitness #  
\_\_\_\_\_

Religion/Spirituality #  
\_\_\_\_\_

Fun/Recreation #  
\_\_\_\_\_

Travel/Adventure #  
\_\_\_\_\_

Free Time #  
\_\_\_\_\_

1. What do I currently love about my life and why?

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2. What areas of my life am I most dissatisfied with and why?

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3. How are these lagging areas impacting my loved ones?

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4. What repercussions are these lagging areas causing on other parts of my life?

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5. Would my life improve if I were to dedicate time to improving these areas of my life?

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## LETTER TO YOURSELF

1. **Visualize Your Future Self:** Close your eyes and imagine yourself in the future. Think about where you are, what you're doing, who you're with, and how you feel. Consider aspects such as your career, personal life, health, and hobbies. Be as detailed as possible in your visualization.

2. **Write a Letter to Your Present Self:** Begin your journal entry by writing a letter from your future self to your present self. Address the changes you've noticed, the achievements you've made, and the obstacles you've overcome.

3. **Detail Your Life:** Describe a day in your future life in detail. What does your morning routine look like? What work are you doing, and how do you feel about it? How do you spend your free time? Who are the important people in your life?

4. **Reflect on Changes:** Think about what had to change from your present to reach this future. What habits did you adopt? What beliefs did you let go of? How did you overcome challenges?

5. **Express Gratitude:** Finish your journaling by expressing gratitude to your future self for showing you what is possible. Acknowledge the work it will take to get there and commit to the journey.

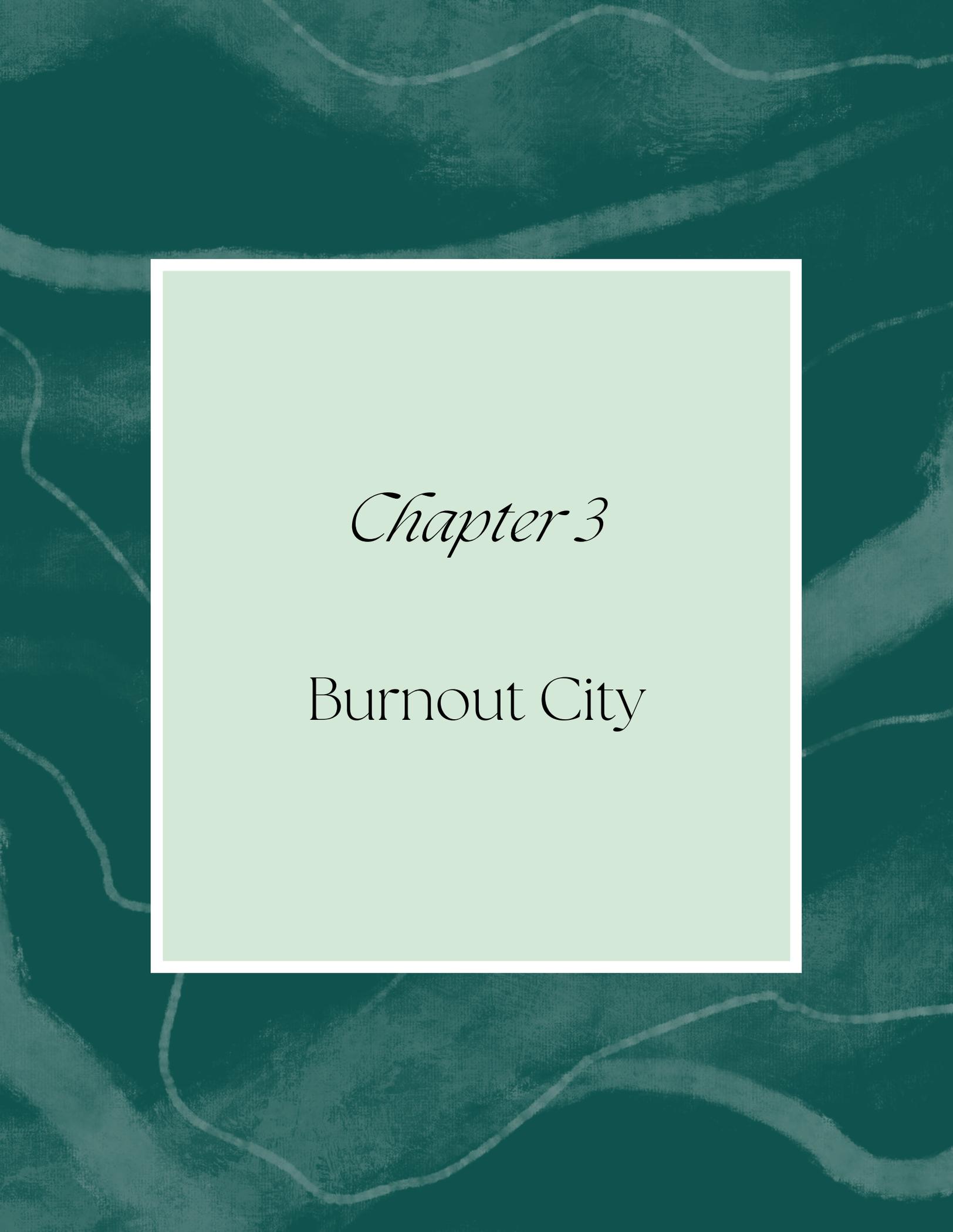
6. **Review Regularly:** Come back to this exercise and your entries regularly to remind yourself of your direction and to adjust your actions and goals as needed.











*Chapter 3*

Burnout City

## BURNOUT QUIZ

This quick quiz is designed to help you identify the extent to which burnout may be impacting your real estate business. Answer each question honestly to gain insights into your current situation.

1. How often do you feel exhausted or drained by the demands of your real estate business?

- a) Rarely or never
- b) Occasionally
- c) Frequently or always

2. How satisfied are you with the work-life balance in your real estate career?

- a) Very satisfied
- b) Moderately satisfied
- c) Not satisfied

3. How often do you find it challenging to disconnect from work, even during your personal time?

- a) Rarely or never
- b) Occasionally
- c) Frequently or always

4. How often do you experience feelings of cynicism or detachment toward your work?

- a) Rarely or never
- b) Occasionally
- c) Frequently or always

5. How often have you noticed a decline in the quality of your work or the level of service you provide to clients?

- a) Rarely or never
- b) Occasionally
- c) Frequently or always

## BURNOUT QUIZ RESULTS

**Mostly A's:** Great job maintaining a healthy balance! Burnout seems to have a minimal impact on your business currently.

**Mostly B's:** It appears there may be some signs of burnout affecting your well-being. Consider implementing strategies to address stressors and enhance work-life balance.

**Mostly C's:** High scores in this category suggest that burnout may be significantly impacting your business. It's crucial to prioritize self-care and explore strategies to mitigate burnout symptoms.

1. Do you see signs or symptoms of burnout in your life right now or in the past?

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2. Has burnout affected your personal relationships with your partner, children, family, and friends?

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3. In what ways has burnout showed up in your job and with your clients?

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4. How has burnout affected your physical health?

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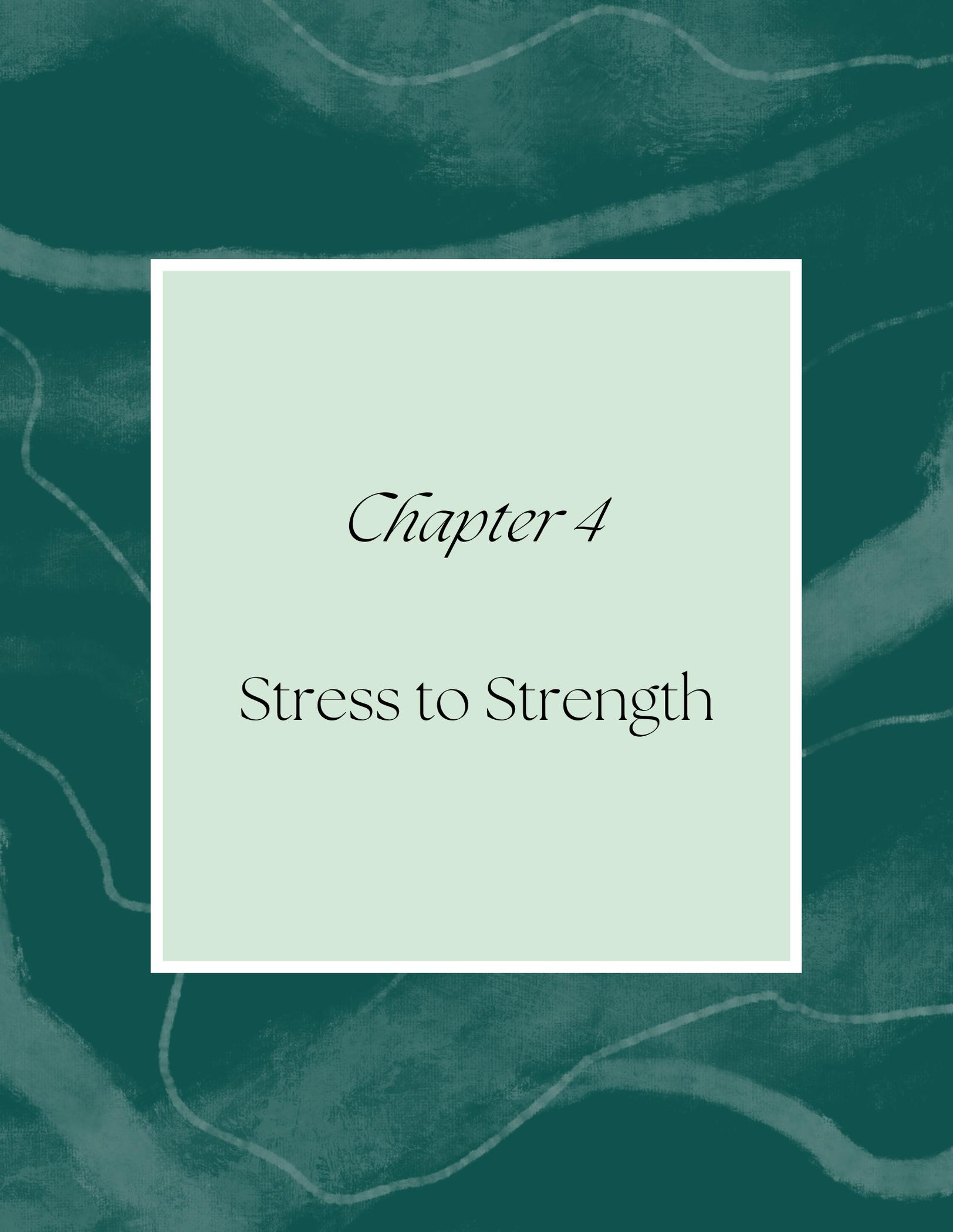
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Self-care is *not* an expense,  
it's an *investment*.



*Chapter 4*

Stress to Strength

1. Where have you been neglecting your body?

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2. What are you putting off taking care of that you really should address?

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3. What technique are you committed to learning and adding into your self-soothing plan?

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4. How can you incorporate mindful breathing into your daily routine?

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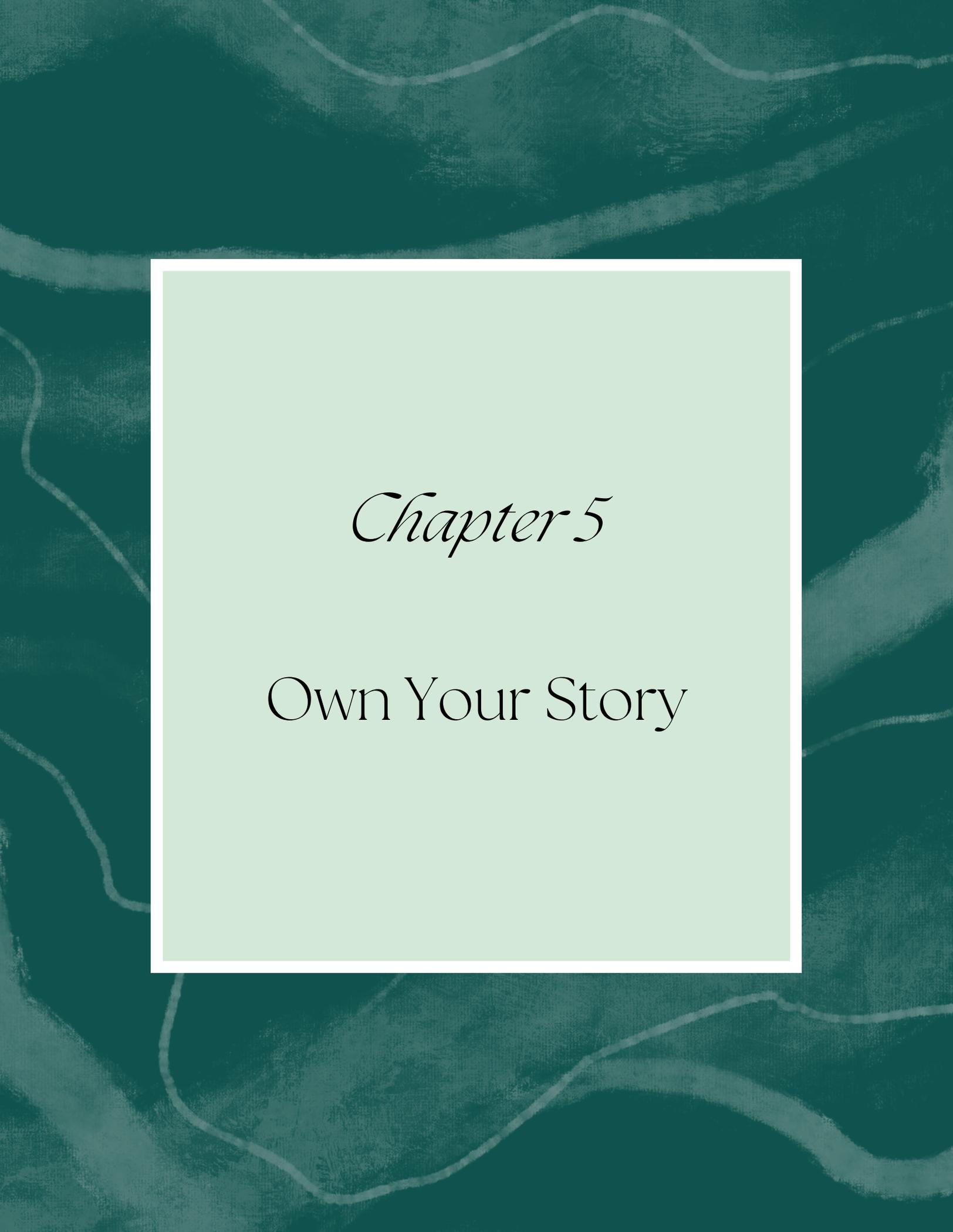
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Visit <https://legacy-agents.com/book-resources/> to access the free month of Breathe with Regina. Try this practice at least four times before judging if it's the right breathing experience for you.





*Chapter 5*

Own Your Story

## CHILDHOOD TRAUMA

a. What were you often told as a child that you believed to be true?

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b. How did this shape the recurring thoughts about stories you tell yourself?

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## SELF-COMPASSION

a. What are the most common recurring thoughts and emotions that you experience on a daily basis?

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## SELF-COMPASSION

b. Are these stories and thoughts universally true, kind, or helpful?

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c. Think about a difficult situation you're going through right now or have been through recently. Write down the thoughts, feelings and stories you have created about yourself in relation to this situation. What does this situation mean about you as a person?

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## SELF-COMPASSION

d. How is this situation causing you to feel isolated, like it shouldn't have happened or that you're the only person this has ever happened to?

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e. If your friend came to you with the same situation, what would you say to them?

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f. How can you acknowledge or validate your pain or discomfort in this experience and remind yourself that it's normal to have feelings like this and that most people likely would share these feelings in a similar situation?

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## SELF-COMPASSION

g. What are some ways that you can be kinder to yourself during situations like this without criticizing yourself, calling yourself names, or being mean to yourself?

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## SHADOW WORK

a. What are some behaviors that you see in others that trigger a negative response?

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b. Is it possible that under different circumstances, you could display those same behaviors?

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## SHADOW WORK

c. How can you see triggers as an opportunity to explore why you have negative thoughts and emotions around a specific behavior?

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## PEOPLE-PLEASING

a. What emotions are difficult for you to experience in others and why?

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b. Where are you compromising your own needs in favor of others?

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## PEOPLE-PLEASING

c. Are there any situations where you find yourself resenting others as a result of doing things you don't really want to do?

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## BOUNDARIES

a. Where do you currently have boundaries that are being infringed upon?

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b. Where do you have a boundary you have not adequately expressed to your clients?

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## BOUNDARIES

c. Where can you implement boundary setting and expectations within your client journey?

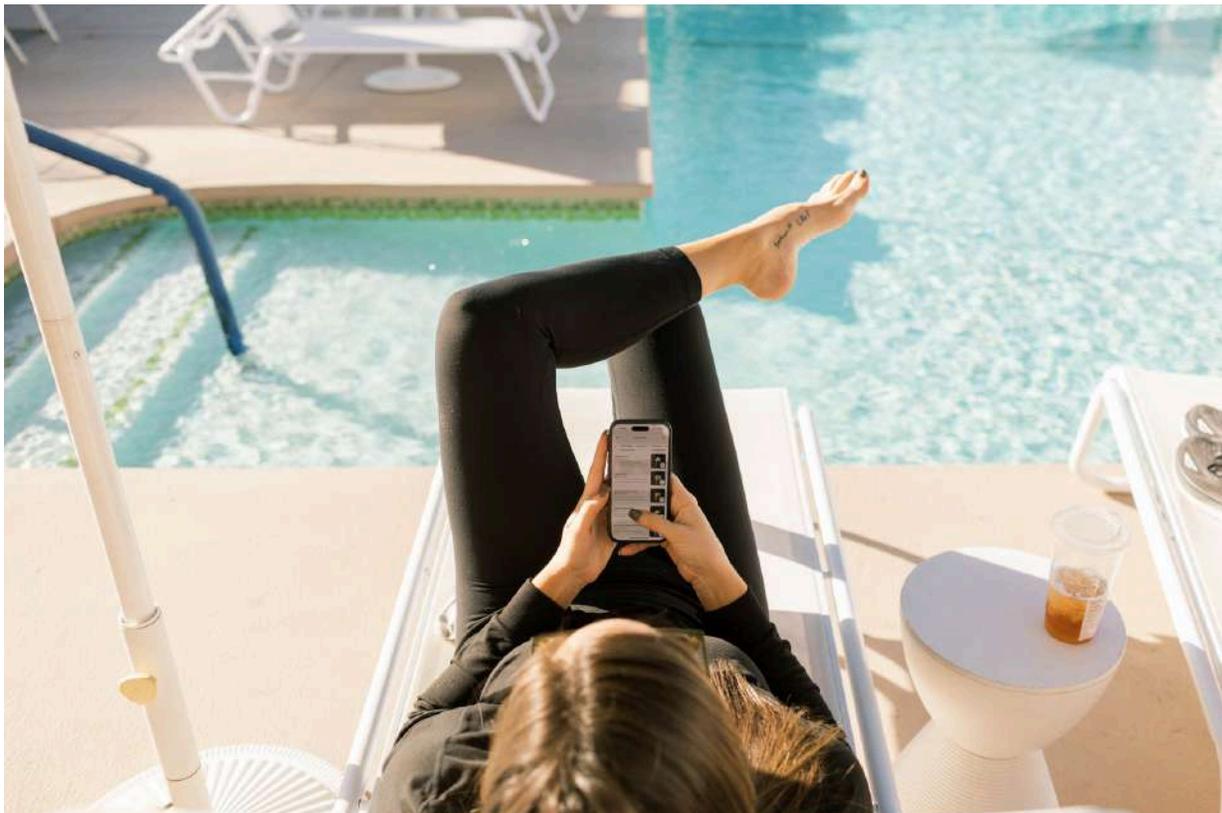
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# *Chapter 6*

## Retrain Your Brain

## GUIDELINES FOR POSITIVE AFFIRMATIONS

- **Be positive and present:** Frame your affirmation in a positive and present tense. Instead of stating what you don't want, focus on what you do want. For example, say "I am" or "I have" instead of "I will not" or "I am not."
- **Keep it short and specific:** Keep your affirmation concise and specific. Clearly articulate the positive quality or outcome you're affirming. Short affirmations are easier to remember and repeat.
- **Use positive language:** Choose positive and uplifting words. Avoid negative terms or words that trigger doubt. Focus on what you can do or achieve.
- **Make it personal:** Tailor the affirmation to your personal goals and values. This makes the affirmation more meaningful and relevant to your journey.
- **Add emotion:** Infuse your affirmation with genuine emotion. Feel the positive emotions associated with achieving your goal. Emotion adds depth and resonance to your words.

Create one powerful affirmation to focus on and write it below:

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Next, in a separate notebook or journal, write your affirmation twenty five times each day for the next twenty five days. Observe the transformation in your mind over the course of the twenty-five days. Each day after you've written your affirmation twenty-five times, repeat it to yourself in the mirror five times, and end with a high five in the mirror. Check off your daily work in the table provided throughout the twenty-five days.

## AFFIRMATIONS ACCOUNTABILITY TRACKER

	AFFIRMATION X25	MIRROR X5	HIGH FIVE	OBSERVATIONS
DAY 1				
DAY 2				
DAY 3				
DAY 4				
DAY 5				
DAY 6				
DAY 7				
DAY 8				
DAY 9				
DAY 10				
DAY 11				
DAY 12				
DAY 13				
DAY 14				
DAY 15				

## AFFIRMATIONS ACCOUNTABILITY TRACKER

	AFFIRMATION X25	MIRROR X5	HIGH FIVE	OBSERVATIONS
DAY 16				
DAY 17				
DAY 18				
DAY 19				
DAY 20				
DAY 21				
DAY 22				
DAY 23				
DAY 24				
DAY 25				

How did telling yourself something positive for twenty five days change your mindset?

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How did your thoughts transform over the course of the twenty five days?

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Did any of your actions or results improve over the twenty five days?

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Retraining your brain is simple, but takes dedicated time and effort to make true and lasting transformation. Join the free 21 Day Mindset Reset by visiting <https://legacy-agents.com/book-resources/>.

# *Chapter 7*

You Are Your  
Superpower

## STRENGTHS FINDER 2.0

Order the StrengthsFinder book on Amazon and take the assessment. Complete the following questions once you have your results.

What are your five strengths?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

a. What surprised you?

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b. How has this helped you make sense of your unique gifts?

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## STRENGTHS FINDER 2.0

c. Where can you further enhance your strengths?

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d. How can you share your strengths more effectively within your business and network to communicate your value proposition?

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## ENNEAGRAM

Using the link provided in the book resources, take the Enneagram assessment. Review your results and complete the following questions.

What is your enneagram?

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a. How does knowing your core fear and motivation help you understand yourself better?

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b. What are some of the things you're surprised to learn about yourself?

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## ENNEAGRAM

c. Where can you leverage this knowledge to improve your relationships with others?

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d. How can you leverage your enneagram in your business?

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## HUMAN DESIGN

Using the My Human Design App to determine your Human Design type. Read through the descriptions of your type and complete the following questions.

What is your Human Design?

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a. Is your current business aligned with how your Human Design operates best in the world?

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b. How does awareness of your Human Design influence how you will spend time and energy within your business?

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## HUMAN DESIGN

c. How can you generate more business in alignment with your Human Design makeup?

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## CLOSING THE GAP

a. Where are the biggest gaps between who you are and who you share with the world?

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b. What gifts have you discovered that would be worth sharing with others?

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## CLOSING THE GAP

c. How would it feel to not carry the weight of pretending to be someone other than who you really are?

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d. In what ways are you willing to experiment with closing the gap between who you are and what you show to the world?

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*Chapter 8*

Business  
Besties Unite

## ISOLATION QUIZ

This quick quiz is designed to help you identify the extent to which feelings of isolation may be impacting your real estate business. Answer each question honestly to gain insights into your current situation.

1. How often do you engage in networking activities within your industry?

- a) Frequently, I attend networking events, webinars, and participate in industry forums.
- b) Occasionally, I attend events when convenient.
- c) Rarely, I don't actively seek out networking opportunities.

2. How often do you collaborate or discuss challenges with other real estate professionals?

- a) Regularly, I have a network of colleagues I can turn to for advice and support.
- b) Occasionally, I reach out to others when facing specific challenges.
- c) Rarely, I prefer to handle challenges on my own.

3. Do you have a mentor or advisor guiding you in your real estate career?

- a) Yes, I have a mentor or advisor I consult regularly.
- b) No, but I have considered seeking mentorship.
- c) No, I prefer to navigate my career independently.

4. How connected do you feel to the real estate community at large?

- a) Very connected, I actively engage in industry events and stay updated on trends.
- b) Somewhat connected, I keep informed but could be more involved.
- c) Not connected, I feel somewhat detached from the larger real estate community.

5. How often do you collaborate on real estate projects or joint ventures?

- a) Frequently, I enjoy partnering with others on projects.
- b) Occasionally, I've collaborated on projects in the past.
- c) Rarely, I prefer to work on my own ventures.

## BURNOUT QUIZ RESULTS

**Mostly A's:** Congratulations! You have a strong network and are actively engaged in the real estate community, minimizing feelings of isolation.

**Mostly B's:** You're on the right track, but there might be opportunities to enhance your connections and collaborative efforts.

**Mostly C's:** It seems there might be room for improvement in mitigating feelings of isolation. Consider exploring ways to network, seek mentorship, and engage more with the real estate community.

1. In what ways is isolation showing up in your life?

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2. Where is isolation impacting your relationships with others?

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3. How would feeling more connected, seen, heard, and understood impact the quality of your life?

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4. Write your goal for getting out of the house to work in the company of other agents.

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5. Identify three groups that you'll attend at least once to see if you like the other people and content being shared in the container. Add the meetings on your calendar and make it a priority to attend.

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# *Chapter 9*

Welcome to  
Your CEO Era

## CRAFTING YOUR VISION

It's pretty challenging to get where you want to go if you don't know the destination you're aiming for. A vision is designed to bring clarity to what you hope to achieve in the future with your business.

Your vision is your north star and will guide everything you do in your organization, so it should be clear and inspiring. The general framework of a vision statement should include what you do, for whom you do it, and to achieve what. Your vision is why you do what you do.

Here are some questions to brainstorm when dreaming up your vision statement:

What problem am I solving for the greater good?	Who am I affecting with my solutions and services?
What are my hopes and dreams for my business in ten years?	If success could be guaranteed, what would be the end result of my efforts?

## VISION EXERCISE

Start to jot down words and phrases that come to you for each section. Write for as long as you would like, but ultimately start piecing these together into a concise statement that incorporates all three.

The sentence should look something like this: I do \_\_\_\_\_ for \_\_\_\_\_ to achieve \_\_\_\_\_.

<p>DO WHAT?</p> <hr/>	<p>1</p> <p>What problem am I solving?</p>
<p>Who am I solving it for?</p>	<p>2</p> <p>FOR WHOM?</p> <hr/>
<p>TO ACHIEVE?</p> <hr/>	<p>3</p> <p>What am I wanting to achieve?</p>

## VISION EXERCISE

1. How does having a vision bring more clarity and inspiration to your work?

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2. What impact does having a vision have on you and your clients?

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3. How can you share your vision with others?

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## LIST OF VALUES

Accountability	Ethics	Kindness	Self-Discipline
Achievement	Excellence	Knowledge	Self-Expression
Adaptability	Fairness	Leadership	Self-Respect
Adventure	Faith	Learning	Serenity
Altruism	Family	Legacy	Service
Ambition	Financial Stability	Leisure	Simplicity
Authenticity	Forgiveness	Love	Spirituality
Balance	Freedom	Loyalty	Sportsmanship
Beauty	Friendship	Making a Difference	Stewardship
Being the Best	Fun	Nature	Success
Belonging	Future Generations	Openness	Teamwork
Career	Generosity	Optimism	Thrift
Caring	Giving Back	Order	Time
Collaboration	Grace	Parenting	Tradition
Commitment	Gratitude	Patience	Travel
Community	Growth	Patriotism	Trust
Compassion	Harmony	Peace	Truth
Competence	Health	Perseverance	Understanding
Confidence	Home	Personal Fulfillment	Uniqueness
Connection	Honesty	Power	Usefulness
Contentment	Hope	Pride	Vision
Contribution	Humility	Recognition	Vulnerability
Cooperation	Humor	Reliability	Wealth
Courage	Inclusion	Resourcefulness	Well-Being
Creativity	Independence	Respect	Wholeheartedness
Curiosity	Initiative	Responsibility	Wisdom
Dignity	Integrity	Respect	
Diversity	Intuition	Responsibility	
Environment	Job Security	Risk-taking	
Efficiency	Joy	Safety	
Equality	Justice	Security	

## VALUES EXERCISE

What are your top five values:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

4. How can having clear values help you make better decisions in your business?

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5. How can sharing your values help you connect with others better?

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## BOLD GOAL

SMART Goals are great, but the real change-makers and trailblazers are setting goals that force them to become a new version of themselves to achieve. What is your big, audacious, BOLD goal? Outline the details below.

BRAVE: \_\_\_\_\_

\_\_\_\_\_

OWNERSHIP: \_\_\_\_\_

\_\_\_\_\_

LEARNING: \_\_\_\_\_

\_\_\_\_\_

DETERMINED: \_\_\_\_\_

\_\_\_\_\_

1. Using the “salami method”, slice that big goal down into the first five tasks that you need to get started. List those tasks below:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## SWOT ANALYSIS

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"><li>• What do you do particularly well?</li><li>• What are you known for?</li><li>• What separates you from your competitors?</li></ul>	<ul style="list-style-type: none"><li>• Where are there gaps in your business?</li><li>• What are you doing but not well?</li><li>• Things your competitors are doing better than you?</li><li>• Places where you have resource limitations?</li></ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"><li>• What new strategies and tactics do you want to add to your business?</li><li>• Where is there room to create efficiencies or streamline processes?</li><li>• Where is there white space in your market?</li></ul>	<ul style="list-style-type: none"><li>• Where is there risk to your business?</li><li>• Are you anticipating the market to go up/down?</li><li>• Will there be changes to the rules and regulations within the industry?</li></ul>

On the next page, complete your own SWOT analysis to identify your strengths, weaknesses, opportunities, and threats within your business. Use the prompts above for guidance.

# SWOT ANALYSIS

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

## LEAD SOURCE ANALYSIS

This exercise is aimed to understand the source of where your clients are coming from. Looking back at all your past business, categorize each transaction based on the source. You'll likely have one primary source of leads and several secondary lead sources. Ideally you'll have four core lead sources that feed your business with no single lead source being over 50% of the total leads.

Below is an example of a breakdown for lead analysis. On the following page, complete your own lead analysis by listing your own lead sources.

LEAD SOURCE	# OF UNITS	\$ VOLUME	COST/LEAD
PAST CLIENTS			
SPHERE			
AGENT REFERRAL			
SOCIAL MEDIA			
OPEN HOUSES			
SIGN CALL			
ONLINE REVIEWS			
FARMING			
PAID LEADS			

# LEAD SOURCE ANALYSIS

LEAD SOURCE	# OF UNITS	\$ VOLUME	COST/LEAD

## STOP LIGHT EXERCISE

Building on the previous exercises, this three-part exercise creates a framework for both reflection and planning.

START	STOP	CONTINUE
<ul style="list-style-type: none"><li>• Things that are not being done but should be</li><li>• Things that will lead to better results, things you want to test</li></ul>	<ul style="list-style-type: none"><li>• Things that are being done but not yielding results</li><li>• Things you don't like doing and should outsource</li><li>• Things that are no longer practical to continue</li></ul>	<ul style="list-style-type: none"><li>• Things that are going well</li><li>• Things that haven't proven results but you still want to give time</li><li>• Things you love in your business</li></ul>

On the following page, complete your own Stoplight Exercise. Within each section, start writing down what you plan to do to address the areas of opportunity within your SWOT analysis.

## STOP LIGHT EXERCISE

START	STOP	CONTINUE

## WRAP-UP & FOLLOW UP

Review the results of each exercise and capture the key action items. Categorize each follow-up into the sections below along with a point person and timeline for when they need to be completed:

AUTOMATE	SIMPLIFY	DELETE	OUTSOURCE

## ESTABLISHING YOUR CEO VALUE

Take how much you made last year divided by how many hours you estimate you worked last year.

For example: if you made \$250,000 and worked 2,600 hours (50 hours/week) then your hourly rate would be \$96/hour.

1. Complete your CEO Value calculation below:

2. How do you value your time differently now that you know your hourly rate?

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3. Was it surprising how little or how many things you must do yourself?

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10. What are you committed to not doing and delegating moving forward?

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# *Chapter 10*

## Finances for Success

## FIXED & VARIABLE EXPENSES

List your fixed and variable expenses in the chart on the following page. Once you've categorized them, you'll be able to calculate how much you need to make to operate your business on a month-to-month basis.

**Business Fixed Expenses:** Anything that is consistent month over month or year over year and can be planned well in advance.

**Business Variable Expenses:** Things that change month to month based on marketing activities and closings you have.

Your total monthly operating expense is your fixed expenses plus the average of your variable expenses. Don't forget to add in a buffer and any business investments you'll need to make like vehicle upgrades or even a new computer or cell phone.

FIXED EXPENSES	VARIABLE EXPENSES
Desk fees Licensing fees Professional dues Insurance Marketing Subscriptions Technology Vehicle lease or loan payments Office Supplies / Equipment Continuing Education Fixed Utility Costs	Vehicle Marketing & Advertising Client entertainment & gifts Home staging & photography Closing gifts utilities Transaction fees & commission split Office supplies

## FIXED & VARIABLE EXPENSES

FIXED EXPENSES	VARIABLE EXPENSES

TOTAL:

TOTAL:

TOTAL X 6 = GOAL FOR RUNWAY

1. How has not having a firm grasp on your business finances caused you anxiety or frustration?

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2. How would having professional financial support give you more confidence in your business?

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3. What steps do you need to take to manage your finances like a CEO?

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# *Chapter 11*

## Relationship Capital

## LIFETIME VALUE OF DATABASE CONTACT EXERCISE

Your database is your record of all the equity relationships you have. It's also your money maker. The database is the primary sellable asset inside your business so you need to treat it as if it's the most valuable part of what you do.

Whether you have a database already or are starting from scratch, I recommend you begin this exercise by combing through your phone contacts and social media accounts including Instagram, Facebook, and LinkedIn. Start by categorizing each person into the following buckets:

- **Raving Fans:** People who you would feel comfortable to call, text, or email today. If you were putting together a guestlist for your wedding, they'd most likely be included. These are people you can count on to hire you if they plan to buy or sell a property.
- **Social Circle:** People you consider a friend. You would invite them to a party, but they aren't necessarily on your wedding guestlist. If you reached out they would be excited to hear from you. You're likely one of the top people they think of when it comes to real estate, so you may have a good chance at getting their business when they make a sale or purchase.
- **Acquaintances:** People who you haven't talked to in a while so it could be slightly awkward to reach out. You may have their phone number and keep up with each other on social media. If you saw them out and about you would recognize each other and stop to catch up. They associate you with real estate, but they may have another agent they would hire before you.
- **DND (Do Not Disturb):** The only people who don't belong in your database are people you don't want to work with. Life is too short to waste on people who don't make you feel good, so I'd just leave them off the list. This applies for all your past clients as well. You don't need to market to people you don't actually want to help.

## LIFETIME VALUE OF DATABASE CONTACT EXERCISE

As you go through your phone and social media accounts, capture as much data as you have access to for each person. In order for a contact to be complete, you need to have the following info:

- First and last name
- Email
- Phone number
- Current address
- Birthday

When you consider the lifetime value of adding one person to your database, it really adds up. To calculate this, you need to know how much longer you plan on working, the number of years on average between transactions for your area, and your average commission per transaction.

Here's an example:

1. # of years left to retirement: 20
2. Estimated # of years between real estate transactions: 12
3. Average commission per transaction: \$16,000

Lifetime value of one person in your database calculation:

$(A / B) \times C = \text{Lifetime value of 1 person in database}$

$(20 / 12) \times \$16,000 = \$26,000$

1. In what ways would deepening your existing relationships impact your business?

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2. How can you show your existing relationships that you value them?

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3. In what ways are you committed to creating more relationships to grow your business?

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*Chapter 12*

Branding  
& Marketing  
Like a Boss

## IDEAL CLIENT AVATAR

### DEMOGRAPHICS

Name: \_\_\_\_\_ Age: \_\_\_\_\_ Gender: \_\_\_\_\_

Relationship Status: \_\_\_\_\_ Family Status: \_\_\_\_\_

Pets: \_\_\_\_\_ Education Level: \_\_\_\_\_

Occupation/Industry: \_\_\_\_\_ Avg. Annual Income: \_\_\_\_\_

### GEOGRAPHICS

Lifestyle (active, sedentary, family-oriented, etc.):

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Values & Beliefs (environmental consciousness, community involvement, etc.):

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# IDEAL CLIENT AVATAR

## GEOGRAPHICS

Interests & Hobbies:

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Buying Motivations (investment, downsizing, upsizing, etc.):

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Pain Points & Challenges in Home Buying:

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# IDEAL CLIENT AVATAR

## GEOGRAPHICS

Goals:

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Favorite Social Media Platform:

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Favorite Medium to Learn New Information:

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Favorite Websites:

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## IDEAL CLIENT AVATAR

### REAL ESTATE SPECIFICS

Type of Property Interested in (single-family home, condo, etc.):

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Must-Have Features (garage, garden, number of bedrooms, etc.):

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Budget Constraints:

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Timeframe for Purchase:

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Previous Home Buying Experience:

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## IDEAL CLIENT AVATAR

### COMMUNICATION PREFERENCES

Preferred Methods of Communication (email, phone, in person, etc.):

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Frequency of Updates:

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Desired Level of Involvement in the Process:

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### DECISION-MAKING PROCESS

Key Decision-Makers:

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Most Important Factors:

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## IDEAL CLIENT AVATAR

### SOURCE OF LEAD

How did they find you? (Referrals, online search, advertising, etc.):

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Marketing that Appeals to Them:

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1. How would having an intimate understanding of your ideal client help you position yourself better to win their business?

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2. How would having a preplanned marketing calendar by lead source help you reach your business goals?

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## BRAND QUESTIONNAIRE

1. What emotions does your brand/business exude (happy, confident, calm)?

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2. What words would you use to describe your brand/business?

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3. How would you describe your brand personality (professional, friendly, innovative, traditional)?

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4. Are there any existing brand colors, logos, or visual elements that should be incorporated or avoided?

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5. What adjectives should people associate with your brand?

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6. How do you want people to feel when they see your brand?

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7. Is your brand playful or serious?

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## BRAND QUESTIONNAIRE

8. Is your brand luxury or affordable?

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9. Is your brand modern or classic?

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10. Is your brand youthful or mature?

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11. Is your brand loud or understated?

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12. What are three brands you love?

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13. Who are your three closest competitors?

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14. Gather examples of brand designs you admire or aspire to emulate.

15. What are the primary channels you'll use to communicate with your audience (social media, email, print, etc.)?

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16. How do you plan to use your brand design (website, packaging, advertising, etc.)?

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# MARKETING CALENDAR

Using the lead sources you identified in Chapter 9, write out your annual marketing plan for each source.

LEAD SOURCE 1: \_\_\_\_\_

## ANNUAL ON- GOING MARKETING

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Q1	Q2	Q3	Q4

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

# MARKETING CALENDAR

LEAD SOURCE 2: \_\_\_\_\_

## ANNUAL ON- GOING MARKETING


Q1	Q2	Q3	Q4

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

# MARKETING CALENDAR

LEAD SOURCE 3: \_\_\_\_\_

## ANNUAL ON- GOING MARKETING


Q1	Q2	Q3	Q4

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

# MARKETING CALENDAR

LEAD SOURCE 4: \_\_\_\_\_

## ANNUAL ON- GOING MARKETING

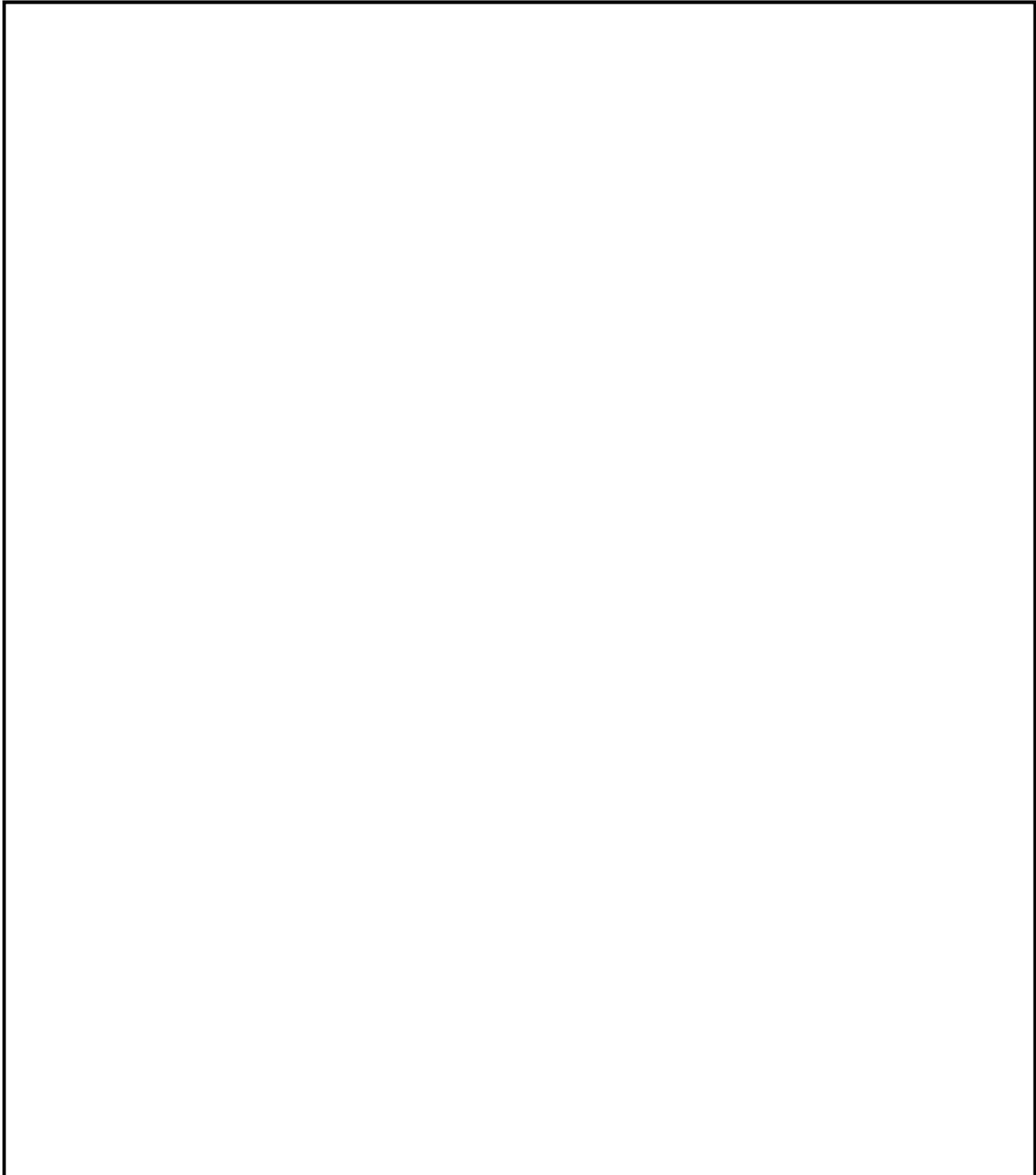

Q1	Q2	Q3	Q4

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

## CLIENT JOURNEY MAPPING

### SELLER JOURNEY

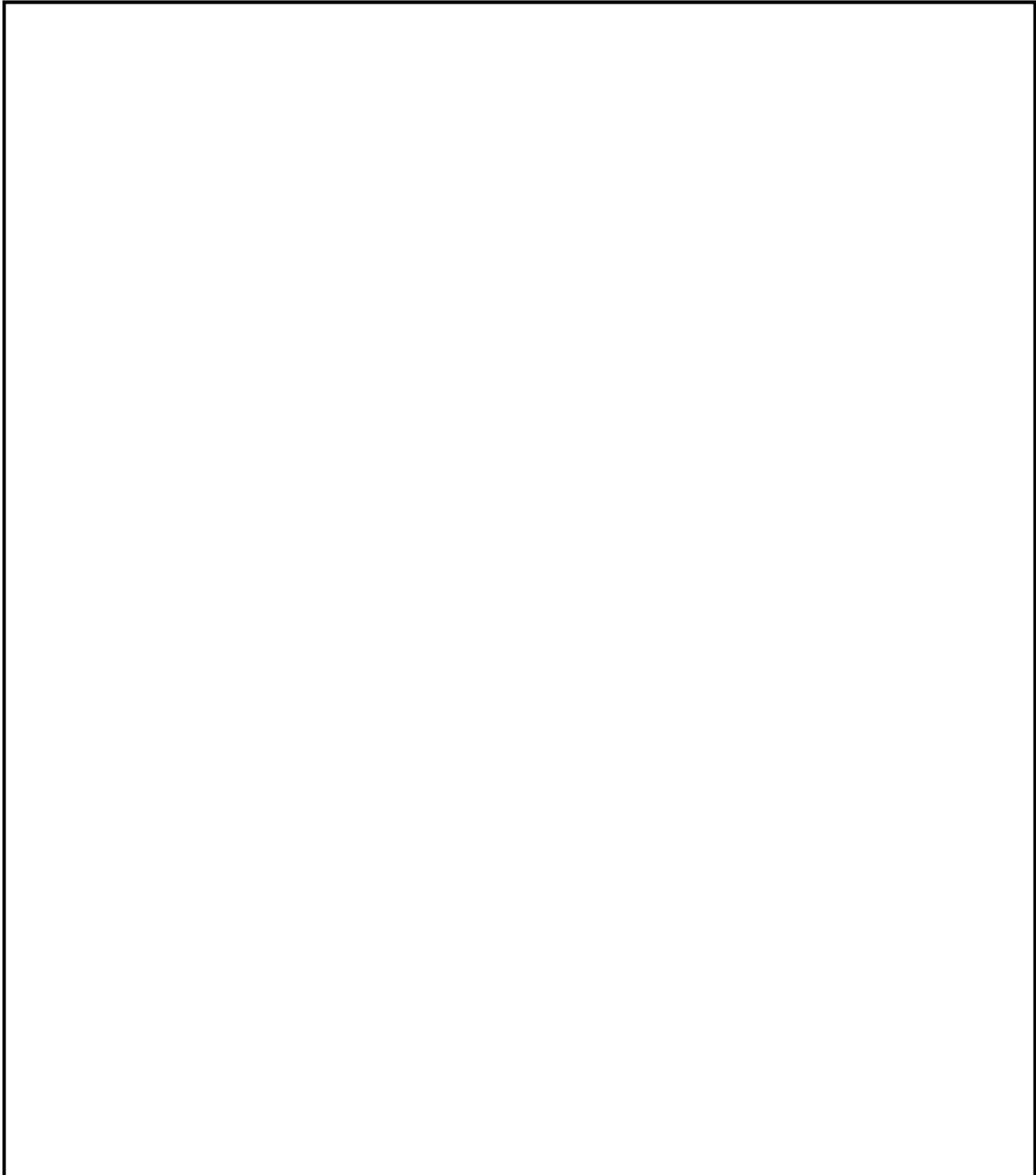
Use the space below to map out your client journey:

A large, empty rectangular box with a thin black border, intended for mapping the client journey. The box is currently blank.

## CLIENT JOURNEY MAPPING

### BUYER JOURNEY

Use the space below to map out your client journey:

A large, empty rectangular box with a thin black border, intended for mapping out the client journey. The box is currently blank.

# *Chapter 13*

## Creating Additional Income Opportunities

1. Where do you need to streamline and delegate in your life and business to have capacity mentally, emotionally, and physically to take on an additional responsibility?

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2. What would having an additional stream of income mean for your life?

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3. Which of the additional income streams feels most aligned and exciting to you?

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4. Which feels most practical at the moment?

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5. What is one thing you can do to get started today?

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# Living Your Legacy

Now you're part of the Legacy Agents community. It's your duty to reach your hand back to a woman a few steps behind you to pull her along with you. Give her this book, see how you can add value or lend a listening ear and be her cheerleader. The journey is much sweeter when you have the right people alongside you for the ride.

For your final exercise, review the letter you wrote to yourself in Chapter 2 and respond to the prompts on the following page.

1. What items have you already made progress on?

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2. What parts of your life or business need more attention to achieve your goals?

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3. How can you start living as the future version of yourself today?

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Now, go out and  
be f\*cking  
LEGENDARY!

Knowledge without action is meaningless. Take the time to decide what pieces of this book you can plug into your business right away. You don't have to do it all, you just have to do what you're willing to commit to at a very high level consistently. If I can do it, believe me, you can too!

XO,  
*Lindsay*