

# Year-End

## REFLECTION FOR REAL ESTATE AGENTS



### GET CLEAR ON WHAT WORKED, WHAT DIDN'T, AND WHAT TO TIGHTEN NEXT.

Most real estate agents finish the year tired... and immediately jump into planning the next one. That's a mistake. Before you set new goals, add new systems, or chase a bigger number, you need clarity on what actually drove results—and what quietly drained your time, energy, and focus.

This short reflection isn't about motivation or "manifesting" a better year. It's about seeing your business clearly so you can make smarter decisions going forward.

Set aside 30–40 uninterrupted minutes. Be honest. Write real answers. The value is in the clarity that follows.

### SECTION 1: LOOK BACK WITH ACCURACY

#### 1. Wins That Mattered

List your top three wins this year. What specifically made each one possible? (Activities, habits, people, systems.)

WIN	WHAT MADE IT POSSIBLE

## 2. Lessons From What Didn't Work

Identify your biggest challenges or failures this year.

What did they teach you about:

- your systems?
- your calendar?
- your follow-up?
- your decision-making?

CHALLENGE	LESSON LEARNED

## 3. Where Business Actually Came From

Ignore what ***felt*** busy. Focus on what produced actual sales.

(Check all that apply and note sales volume.)

- Referrals: \_\_\_\_\_
- Past clients: \_\_\_\_\_
- Open houses: \_\_\_\_\_
- Online leads: \_\_\_\_\_
- Sphere / SOI outreach: \_\_\_\_\_
- Other: \_\_\_\_\_

Which activities delivered the highest ROI on your time and energy?

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## SECTION 2: WHAT TO ADJUST FOR THE YEAR AHEAD

### 4. Relationship Consistency Check

How many touches did you have with past clients this year?

Consistent, planned follow-up: \_\_\_\_\_

Sporadic / reactive: \_\_\_\_\_

Minimal or none: \_\_\_\_\_

What's one simple change that would improve this next year?

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## 5. Time & Life Alignment

Did your business support the life you want...  
or did it control your time and energy?

What felt most out of balance?

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What do you want *more* of next year?

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## 6. One Habit That Would Move the Needle

If you built one habit consistently, which would most improve your:

- energy?
- focus?
- production?

Be specific.

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## 7. Beliefs That Are Quietly Holding You Back

What belief about yourself is limiting your growth?

Examples:

- "I'm bad at follow-up."
- "I don't want to bother people."
- "I'm not consistent."

Your beliefs:

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What actions are you avoiding because of these beliefs?

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## 8. The Task You've Been Avoiding

What is the ***one thing you've been putting off*** that would create immediate relief or momentum once completed? Avoided tasks don't just sit on a list — they quietly drain focus, create pressure, and keep you reactive.

**Name the task clearly.** What is the specific task you've been avoiding? (Write it as a real deliverable — not a vague goal.)

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**Why has it been avoided?**

- Too many steps
- Unclear what "done" looks like
- Time/energy has been too scattered
- Fear of messing it up / doing it wrong
- It keeps getting pushed behind urgent client work
- Other: \_\_\_\_\_

**Define "done."** What does "complete" look like? (Be specific enough that you'll know when it's finished.)

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**What changes when it's done?** This is the payoff. What will improve immediately?

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The biggest relief will be:

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**Set the date and lock the first step.** Pick one first move and a real completion date.

First step (15 minutes or less):

Day:	Time:
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Completion Date

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Task

Day:	Time:
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Completion Date

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*Coach note:* If you can't name the first step, the task is too big. Break it down until the next move is obvious.

If this reflection surfaced a few gaps—or confirmed what you already suspected—that's a good thing. This worksheet isn't about calling yourself out—it's about getting honest so you can move forward with a plan.

Dash 2 Success helps you turn insight into action with clear priorities, simple systems, and weekly accountability, so you can build a business that supports your life — not drains it. [See How Dash 2 Success Works](#)

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