

## THE ROLES AND GOALS WORKBOOK

Welcome to the Roles and Goals Workbook. First, let me be very up front in confessing that these are not my ideas by any vain stretch of my imagination. They appear in various forms in a number of places, with credit due to far greater men than I. However, the concepts are incredibly sound and potentially life-changing. If this workbook helps you to more easily follow through on putting pen to paper--or finger to keyboard--then I've done my small part.

Use of the Roles and Goals Workbook is fairly simple, and I've tweaked it a bit with the addition of one final distillation from goals to daily, weekly or monthly habits and/or tasks that will allow you to accomplish those goals.

Beginning on the next page, labeled "ROLES," make a list of the primary roles you play in your life. I've left my list there to give you a reference.

The next page is an example of how to break down that particular role. First, it asks for a description of what you believe success or fulfillment in that role will eventually look like. Take your time. Be as specific as possible. To get more out of it, do this over the course of a week, spending a good amount of time, once per day, really digging into each role in your life.

From there, make a list of goals that would result in that description. Ideally these goals should be realistic, measurable, and time-bound when possible.

Finally, distill these goals into shorter term--daily, weekly, or monthly--tasks that you can realistically implement immediately. What will directly result in the accomplishment of the goals above?

I sincerely hope you find this to be a helpful exercise. Please write to me at [www.brianbandas.com](http://www.brianbandas.com) with any suggestions!



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# ROLES AND GOALS WORKSHEET

## My Roles

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_

## EXAMPLE

**ROLE #1:** Buyer Agent Team Leader

### **What does long term success in this role look like:**

Long term success as a buyer team leader includes a few key things. First, every agent hired contributes to the culture of our team with a hunger to learn, to grow, to achieve excellence, and with excitement about the things that are most valuable to our team. Every team member is averaging at minimum 18 transactions per year, and a conversion rate of at least 3%. I have built a team of a minimum of 20 buyers agents.

### **What goals, if achieved, would result in the description above?**

1. development of a lead conversion tracking system - highly automated
2. a complete new hire manual/handbook
3. 2% conversion of website leads
4. 5 new agents by end of 2015; 10 new agents by end of 2016; 20 new agents by 2017
5. \_\_\_\_\_

### **What daily, weekly or monthly habits can/should you implement in order to reach those goals?**

1. Incorporate review of monthly and annual goals in monthly team meetings (once/month)
2. Examine follow-up on one example lead per weekly team meeting (once/week)
3. Complete a new section of New Hire Handbook per week
4. Time block 1 individual weekly accountability/progress phone call w/ each buyer agent
5. build the bench: 1 phone call/week to industry peers, "Who do you know that we should know?"



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**ROLE #1:** \_\_\_\_\_

**What does long term success in this role look like:**

**What goals, if achieved, would result in the description above?**

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

**What daily, weekly or monthly habits can/should you implement in order to reach those goals?**

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



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**ROLE #2:** \_\_\_\_\_

**What does long term success in this role look like:**

**What goals, if achieved, would result in the description above?**

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

**What daily, weekly or monthly habits can/should you implement in order to reach those goals?**

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

**ROLE #3:** \_\_\_\_\_

**What does long term success in this role look like:**

**What goals, if achieved, would result in the description above?**

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

**What daily, weekly or monthly habits can/should you implement in order to reach those goals?**

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

**ROLE #4:** \_\_\_\_\_

**What does long term success in this role look like:**

**What goals, if achieved, would result in the description above?**

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

**What daily, weekly or monthly habits can/should you implement in order to reach those goals?**

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

**ROLE #5:** \_\_\_\_\_

**What does long term success in this role look like:**

**What goals, if achieved, would result in the description above?**

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

**What daily, weekly or monthly habits can/should you implement in order to reach those goals?**

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



**ROLE #6:** \_\_\_\_\_

**What does long term success in this role look like:**

**What goals, if achieved, would result in the description above?**

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

**What daily, weekly or monthly habits can/should you implement in order to reach those goals?**

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



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**ROLE #7:** \_\_\_\_\_

**What does long term success in this role look like:**

**What goals, if achieved, would result in the description above?**

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

**What daily, weekly or monthly habits can/should you implement in order to reach those gc**

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

**ROLE #8:** \_\_\_\_\_

**What does long term success in this role look like:**

**What goals, if achieved, would result in the description above?**

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

**What daily, weekly or monthly habits can/should you implement in order to reach those gc**

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



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