THE ALIGNED AGENT

Build a business you love. Live a life that shows it.

A workshop for real estate professionals

You don't have to do this the way everyone else does.

Name: _____

Date: _____

WELCOME!

These past few years changed everything for me.

A health scare that made me stop and ask the hard questions. Mia leaving for college and becoming an empty nester. A real estate market that shifted faster than any of us expected. A team I was responsible for, even when I wasn't sure of my own footing.

Through all of it, I did the deeper work. I invested in becoming an Exactly What to Say Certified Guide through Phil M. Jones. I studied and I got honest with myself about who I am and what I'm building.

And I built a framework around everything I learned. That framework is what we're working through together today.

Every letter of ALIGNED pairs a mindset shift with a real, tactical tool you can use right away. Let's get to work.

I'm so excited to get aligned with you!

THE PROBLEM

- Busy but not fulfilled
- Productive but not aligned
- Successful but exhausted

THE PROMISE

Greater clarity. Practical systems. Better conversations. More alignment.

THE ALIGNED FRAMEWORK

Awareness
Lead with intention
Identify your strengths
Grow with purpose
Nurture real relationships
Energize your mindset
Design your life

A — AWARENESS

"Self-awareness is a superpower." — Tasha Eurich

Know who you are and what matters most. Clarity creates confidence. When you are anchored in your values and purpose, your business becomes an extension of your identity.

Teaching Points

- Core values drive decisions
- If you don't define you, others will
- Income goals must match life goals

TOOL 1: CORE VALUES EXERCISE

Step 1: Circle or choose 5 values that resonate deeply with you.

Alignment	Faith
Growth	Family
Freedom	Service
Integrity	Leadership
Connection	Courage
Impact	Authenticity
Excellence	Joy
Adventure	Contribution
Stability	Simplicity
Creativity	Abundance

Step 2: Narrow to 2 non-negotiables — your guardrails. If violated, everything feels off.

Non-negotiable 1: _____

Non-negotiable 2: _____

Key question: Does my calendar reflect my core values?

_____

_____

_____

ASK YOUR AI: *Based on everything you know about me from our conversations, how I describe my work, my goals, my frustrations, and what matters most to me, what would you say are my core values? Please identify 5 likely core values, explain why you chose each one, then narrow them into 2 non-negotiable foundation values. Tell me what patterns you see in how I make decisions. Be honest and specific.*

TOOL 2: THE 3x3x3 FRAMEWORK (Phil M. Jones)

A note from Jennie:

When I worked through the 3x3x3 as part of my Exactly What to Say certification training with Phil M. Jones, it gave me the clearest thinking I have ever had about who I serve, what their real problems are, and how I specifically help them. It sharpened my messaging, my conversations, and my confidence. I highly recommend setting aside real time to go deep on this one.

The 3x3x3 framework asks you to identify 3 ideal clients, name 3 problems each faces, and describe 3 solutions you offer — then build your powerful "I help X achieve Y so that..." statement for each.

RESOURCE: The full 3x3x3 worksheet from Phil M. Jones is in your resource folder. Use the grid below to get started, then go deeper with Phil's full version after class.

ASK YOUR AI: *Based on what you know about me, my goals, my values, and how I describe my work — help me complete the 3x3x3 framework. Identify my 3 ideal clients, their 3 biggest problems each, my 3 solutions for each, and write my 'I help X achieve Y so that...' statement for each. Then help me write one master statement about who I am.*

In your own words, who are you? What do you stand for?

Who am I?

Who am I looking to serve?	What are their problems / challenges?	What are my solutions?	What are my "I help X achieve Y, so that..." statements?
Client 1			*"I help _____ achieve _____ so that _____"*
Client 2			*"I help _____ achieve _____ so that _____"*
Client 3			*"I help _____ achieve _____ so that _____"*

TOOL 3: WHAT'S YOUR HOUR ACTUALLY WORTH? (Phil M. Jones)

Step 1: How much money do you want to make?

Step 2: How many weeks are you actually going to work?

Step 3: How many hours a week do you want to work?

Step 4: Divide — your hourly rate
Income goal / working weeks / hours per week = your hourly rate
Example: $100,000 / 40 weeks / 40 hours = $62.50 / hour

Step 5: Triple it — your wholesale rate
Example: $62.50 x 3 = $187.50 / hour. This is the real cost of buying one hour of your time from you.

Without awareness, everything feels urgent.

THINKING TIME: *What truly matters to me in this season of my life and business? And what is worth my precious and valuable time?*

L — LEAD WITH INTENTION

"You carry the passport to your own happiness." — Diane Von Furstenberg

Design your days with purpose, not pressure. Focus your energy where it matters most. Your calendar should reflect your values.

Teaching Points

- Build your ideal calendar for success
- Your calendar reflects your values
- Where you focus is where you will go

TOOL 1: YOUR JOB DESCRIPTION

- Lead generation — connecting with people
- Lead follow-up — staying in touch, adding value
- Setting and going on appointments — face to face
- Negotiating deals — getting contracts signed and accepted
- Practicing your skills and personal development

TOOL 2: VALUES-BASED TIME BLOCKING

- Morning routine — meditation, prayer, family
- Intentional time with family — stop working time
- Exercise and eat healthy — move and breathe
- Planning and thinking time — personal growth
- Lead gen and relationship building
- White space for life, rest, and recovery

My ideal calendar notes:

ASK YOUR AI: *Now, knowing my core values, please help me build my real estate business and personal life calendar for purposeful productivity and alignment.*

TOOL 3: THE WTF (WHERE'S THE FOCUS?) DAY PLANNER (Phil M. Jones)

This tool helps you plan every day around the conversations and relationships that matter most.

Daily planning questions:

- Who are the people I need to be asking more questions of?
- What conversations do I need to revisit to continue to progress?
- Where do I have relationships that contain unrealized opportunity?
- What opportunities are awaiting my input to agree on the next action?

The 4 Cornerstones of Conversational Excellence:

- The worst time to think about what you are saying is when you are saying it
- People do things for their own reasons, not yours
- Curiosity is the fuel for great conversations
- The person asking the questions controls the conversation

THINKING TIME: *Does my calendar reflect my priorities? Or other people's? If you don't design your week, someone else will.*

I — IDENTIFY YOUR STRENGTHS

"Above all, be the heroine of your life, not the victim." — Nora Ephron

You don't have to do what everyone else is doing. Discover your natural style and lead generation strategies that align with your personality.

Teaching Points

- Comparison creates chaos
- Strength-based growth scales faster
- Energy is data — it tells you where you thrive

TOOL 1: SWOT SNAPSHOT

Know your strengths, acknowledge your weaknesses, identify your opportunities, and name your threats.

Strengths	**Weaknesses**
Opportunities	**Threats**

TOOL 2: DISC / NATURAL GENIUS

Your DISC style tells you how you naturally show up — and where you do your best work.

D — Dominant: Direct, decisive, doer	Task-focused and active
I — Influential: Inspirational, interactive	People-focused and active
S — Steady: Stable, supportive, sincere	People-focused and reflective
C — Compliant: Cautious, careful, conscientious	Task-focused and reflective

My DISC letters: _____

What this means for my lead generation:

ASK YOUR AI: *Knowing my strengths and my DISC behavior style as being [add your letters here], what form of lead generation would you recommend I focus on if I want to grow my business but not burn out?*

TOOL 3: ENERGY AUDIT

Not all activities cost the same amount of energy. Some give you energy. Some quietly drain it. The goal is to align your work with your strengths.

Gives me energy:	Drains my energy:

THINKING TIME: *What business activities give me energy? Which ones drain me? Burnout often comes from building outside your strengths.*

G — GROW WITH PURPOSE

"Success doesn't come from what you do occasionally. It comes from what you do consistently."
— Marie Forleo

Stop reinventing the wheel. Simplify your systems so you can scale without burnout. Leverage checklists, automations, and tools that let you do more by doing less.

Teaching Points

- Be purposeful about knowing your numbers
- Build intentional database communication
- Create a growth plan and work it

TOOL 1: WHAT'S YOUR DATABASE WORTH?

Before we calculate your database ROI, let's first understand the actual dollar value sitting in your database right now. Most agents have no idea how much money is already in their world.

STEP 1: THINGS YOU'LL NEED TO KNOW FIRST

	Your Numbers
Total METs in your database	
Last year's actual closed units	
Last year's GCI (gross commission income)	
This year's closed unit goal	
Average sales price	
Average commission per transaction	

STEP 2: WHAT'S YOUR DATABASE WORTH?

Your database value:	**What you missed out on:**
METs x 5% (your database ROI) = A	METs x 5% = A
A x Avg Commission = B	A less your actual closed units
B = What your database is worth	Difference x Avg Commission = $$$

My database is worth: $ _____

I missed out on: $ _____

STEP 3: WHAT'S YOUR DATABASE WORTH PER DAY?

Break it down so you know exactly how many people to contact each day to protect and grow your database value.

3 months in a quarter | 4 weeks in a month | 5 days in a week

Formula	Your Numbers
METs / 3 = contacts per month	
Contacts per month / 4 = contacts per week	
Contacts per week / 5 = contacts per day	

Database value formula	Your Numbers
METs x 5% = A	
A x Avg Commission = B (database value)	
B / METs = amount each MET is worth (C)	
C / 4 (quarterly touch) = value per quarterly call (D)	
Contacts per day x D = cost of your daily lead generation	

Each MET in my database is worth: $ _____ per year

My daily lead generation is worth: $ _____ per day

THINKING TIME: *Every person in my database represents real money. Every conversation I don't have is an opportunity I leave on the table. What would change if I treated my database like the asset it actually is?*

Now let's calculate your actual Database ROI and your tempo to grow it.

TOOL 2: DATABASE ROI CALCULATOR

Last Year Snapshot	2026 Gameplan
Closed transactions last year: _____	Closed transaction goal: _____
Number from MET database: _____	% from MET database: _____
% of closed business from database: _____	# of people needed in MET database: _____
Number of people in MET database: _____	# to add to MET database: _____
Current conversion rate: _____	Tempo per month: _____
	Tempo per week: _____

When you grow your database, you grow your business.

TOOL 3: THE 4M FOCUS FILTER

Market: Who am I talking to?	Method: How will I deliver the message?
Message: What do they need to know?	Metrics: How will I measure results?

My focus this month:

TOOL 4: CONNECT TO CONVERT — THE 5-STEP DANCE (Phil M. Jones)

Questions → Conversation → Relationships → Opportunities → Actions

When someone comes to mind: reach out, start a conversation, offer value or support, stay connected.

> **ASK YOUR AI:** *Based on my database size, my average commission, and my closed transaction goal this year — help me calculate what my database is worth, what I may have left on the table, and what my weekly tempo should be to hit my goal. Then give me a simple 4-week communication plan to start building momentum with my database right now.*

N — NURTURE REAL RELATIONSHIPS

"People will forget what you said, people will forget what you did, but people will never forget how you made them feel." — Maya Angelou

Your database is your greatest asset. Learn to connect in meaningful ways through meaningful conversations, not just making contacts.

Teaching Points

- Depth beats volume
- Conversations build confidence
- Relationship equity compounds over time

Stop counting conversations. Make conversations count. — Phil M. Jones

TOOL 1: MET GROWTH PLAN + 7 STEPS TO SOLIDIFY NEW MET RELATIONSHIPS

- Where in your life can you comfortably meet 2 new people a week?
- What activities already bring you into conversations with new people?
- Which of your daily or weekly routines could naturally generate more METs?
- Where have you met new people this year that didn't get added to your database?
- What usually stops you from capturing someone as a MET?
- What system or checklist would make adding new METs frictionless?

My plan to add METs: _____

7 STEPS TO SOLIDIFY NEW MET RELATIONSHIPS

1. Connect with FORD to deepen the relationship*- family, occupation, recreation, dream*

2. Determine if they are "right now" or "not now" with their home needs*- helps to best follow-up*

3. Be social*- get permission to stay in touch online & in the future*

4. Connect again*- hand written note, market report, coffee/lunch*

5. Gather more contact info*- kids, pets, preferred communication*

6. Add to database with touch plan*- tags and consistency*

7. Snail mail still matters*- birthday cards, invites, calendar*

And always- make follow-up fun!

TOOL 2: MEANINGFUL CONVERSATIONS CHEAT SHEET

The purpose of a call or message is NOT about selling. It's about reconnecting, being curious, adding value, strengthening trust, and staying memorable.

Step 1: Reconnect with a warm opening

- "Hey! You popped into my mind and I realized it's been too long — how are you?"
- "I was just thinking about you and wanted to check in — how's life treating you?"

Step 2: Be curious — ask 1 to 3 of these

- "What's new for you this year?"
- "What's been the best part of your month so far?"
- "Any projects happening around the house?"
- "What are you excited about or working toward right now?"

Step 3: Add value with a soft real estate touch

- "If you ever need anything home-related — questions, updates, contractors — I'm always here."
- "If anything changes with your home plans, please know I've got resources for you."

The perfect close

- "It was great catching up! I want to stay better connected — what's the best email and mailing address for you these days?"

TOOL 3: THE TRUST TRIANGLE (Phil M. Jones)

Phil M. Jones teaches that trust is built through three critical ingredients. When all three are present, people move from conversation to action.

Curious questions lead to Certainty —> because now you understand their situation.

Empathy leads to Relatability —> they see that you understand them.

Courage is what you have after the questions and empathy —> the courage to take action, like asking for the appointment or inviting them to work together.

CURIOSITY	→	Certainty
EMPATHY	→	Relatability
COURAGE	→	Action

Self-reflection: rate yourself 1 to 5 on each element:

Curiosity	1	2	3	4	5	Certainty	1	2	3	4	5
Empathy	1	2	3	4	5	Relatability	1	2	3	4	5
Courage	1	2	3	4	5	Action	1	2	3	4	5

The element I want to strengthen most:

One conversation this week where I will bring more of that element:

TOOL 4: EWTS MAGIC SOFTENING PHRASES

"Just out of curiosity..."	"Would you be open to...?"
"Who do you know...?"	"Would it help if..."

TOOL 5: QUARTERLY CONNECTION PLAN

Q1 — Curiosity and Connection

"Hey [Name], just out of curiosity — how's everything going with your home these days? Have you made any fun updates recently?"

Q2 — Value Add

"Hi [Name], I just put together a list of [trusted contractors / seasonal home tips / community updates]. A lot of people have found it useful. Would it help if I sent you a copy?"

Q3 — Social Proof and Stories

"Hey [Name], a lot of my clients lately have been [moving up / downsizing / investing]. Most people don't realize how the market shift is creating opportunities. Has that crossed your mind at all?"

Q4 — Direct Ask and Gratitude

"Hi [Name], just wanted to say thanks again for trusting me when we worked together. How open-minded would you be to a quick catch-up before the new year?"

THINKING TIME: *Who in my database have I been neglecting that I'd love to reconnect with? You don't need more leads. You need more meaningful conversations.*

ASK YOUR AI: *Help me write a personal, warm outreach message for each of the following: a past client I haven't spoken to in over a year, a referral partner I want to deepen a relationship with, and a new person I just met that I want to add to my database. Each message should feel genuine, curious, and not salesy.*

E — ENERGIZE YOUR MINDSET

"Almost everything will work again if you unplug it for a few minutes — including you." — Anne Lamott

Guard your peace and prioritize your well-being. Build rhythms and routines that renew your energy and focus your thoughts.

Teaching Points

- You can't pour from an empty cup
- Determine your day or other people will
- Bless those negative thoughts

TOOL 1: MINDFULNESS RESET

Three mindsets for success (from Jay Shetty):

- Thankfulness — you can't have a grateful and an anxious thought at the same time
- Insight — our mind needs to feel like we are learning and growing each day
- Exercise — move and be active

The 1/3/7 System (from Jordan Freed):

- 1 day off a week | 3 days off a month | 7 days off a quarter
- W2 — Wellness Wednesday: one afternoon off midweek as a reward and a reset.

TOOL 2: EFFECTIVE OR EFFICIENT DAY

Efficient day:	Lots of smaller tasks to knock off the list
Effective day:	One really big thing done at a high level with full focus

Today is: _____

TOOL 3: BREATHE, BLESS, BUFFER

- Breathe — breath work resets your nervous system and your energy
- Bless and release — acknowledge the negative thought, bless it, and release it.
    - Go into solution mode, not stress mode
- Buffer blocks — 15 to 30 minute time blocks in your calendar throughout the day to keep your energy high

TOOL 4: LBs AND NTs (Phil M. Jones)

Phil M. Jones teaches this simple but powerful reflection practice. LBs are what you liked best. NTs are what you would do next time. Together they replace self-criticism with intentional learning.

Where you can use LBs and NTs:

- After a client appointment or listing presentation
- After an open house or community event
- After a team meeting or coaching session
- After a workshop or training you attended
- At the end of the day — what did I do right and what would I do differently?
- After any experience in life or business where you want to grow

The shift: this is not what did I do wrong. It's what did I like best and what would I do next time. Your mind wants to grow — give it a forward-looking question.

Use this after your next appointment, event, or conversation:

LBs — What did I like best?	NTs — What would I do next time?

Build this into your end of day wind-down routine. Even two minutes of LBs and NTs before you close your laptop will change how you show up tomorrow.

What did I do right today? What am I proud of? What did I learn?

THINKING TIME: *What daily or weekly ritual could help me feel more grounded and more present? Protect your peace. Prioritize your presence*

ASK YOUR AI: *Based on what you know about my personality, my schedule, and the season of life I'm in — help me design a simple morning routine and an end-of-day wind-down practice that will help me protect my energy and show up at my best. Keep it realistic and personal, not generic.*

D — DESIGN YOUR LIFE

"The future belongs to those who believe in the beauty of their dreams." — Eleanor Roosevelt

Build a business that supports the life you want. Time block for joy. Say yes to what matters and no without guilt. Alignment is the new hustle.

Teaching Points

- Success without alignment leads to burnout
- Your future self is built by today's decisions
- Saying no creates space for yes

TOOL 1: MEET YOUR FUTURE SELF

Imagine it's three years from today. Your life and business feel aligned, fulfilling, and successful.

What does your day look like?

How are you spending your time?

What kind of clients are you working with?

How do you feel when you wake up in the morning?

What are you no longer doing?

Three words that describe that future version of you:

1. _____ 2. _____ 3. _____

TOOL 2: ALIGNED VISION MAP

Vision without action is just a dream.
Alignment happens when your daily choices support the life you want.

KEEP DOING *What is already working?*	**START DOING** *What moves you closer to your aligned future?*
STOP DOING *What is draining your energy?*	**PROTECT** *What must stay a priority?*

THINKING TIME: *What am I ready to say no to so I can say yes to myself? Alignment often begins with a boundary.*

ASK YOUR AI: *Based on everything you know about me — my values, my strengths, my season of life, and what I've shared about the future I want to build — help me write a one-paragraph vision statement for my life and business three years from now. Make it personal, specific, and aspirational. Then tell me the one thing I should start doing, stop doing, and protect.*

THE ALIGNED FRAMEWORK — YOUR TAKEAWAYS

A — When you have Awareness, you make better decisions.
L — When you Lead with intention, your time reflects your values.
I — When you Identify your strengths, you stop comparing.
G — When you Grow with purpose, you build with intention.
N — When you Nurture relationships, you create opportunity.
E — When you Energize your mindset, you protect your peace.
D — When you Design your life, you build success that lasts.

Which area of the framework spoke to you most?

What aligned action are you committed to this week?

Build a business you love. Live a life that shows it.