

COACHING PROCESS MATRIX

Segments	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
Vision and Mindset	Beginning	Stuck	In Process	Mastery	Kaizen
3 Year Vision					
Elimination					
Mindset Maintenance					
Quarterly Business Planning Strategy					
Habits and Routines	Beginning	Stuck	In Process	Mastery	Kaizen
Morning Ritual/Planning of the Day					
Weekly Planning and Execution					
Front Loading the Year					
Ideal Lifestyle Creation					
Health and Wellness Routines					
Database and Relationship Management	Beginning	Stuck	In Process	Mastery	Kaizen
CRM Selected and Created					
All 5 Lists Categorized					
Process in Place to Execute Consistent Touches					
Client Events					
Consistent Gifting					
Systems and Processes	Beginning	Stuck	In Process	Mastery	Kaizen
Repeatable Buyer Processes Created/Execution					
Repeatable Listing Processes Created/Execution					
Referral Processes Created/Execution					
Post Closing Processes Created/Execution					
Transaction Software in Use					
Lead Generation/Marketing	Beginning	Stuck	In Process	Mastery	Kaizen
3 Rocks of Marketing Identified					
Marketing Process Created/Execution					
Social Media Campaigns in Use					
Effective Personal Brand					
Team Creation (if applicable)	Beginning	Stuck	In Process	Mastery	Kaizen
Proper Capacity Needs Identified					
Team Members Identified					
Team fully trained					