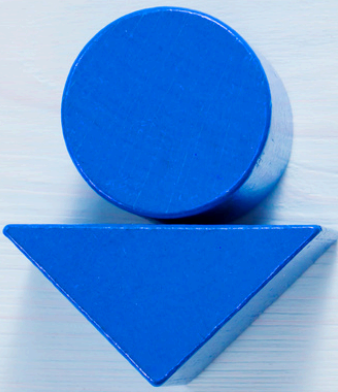


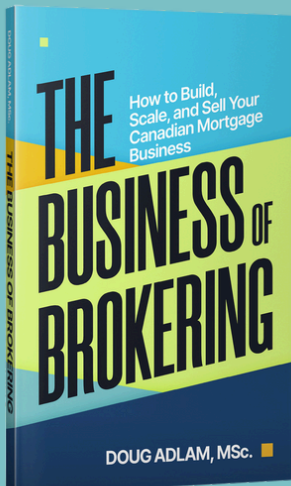
## Chapter 11 – Worksheet

# Redefining Success



## Volume VS. Value

Purpose: Learn how to establish metrics and KPIs to track what really matters in your business.



# 1. Define Your Personal Success

In your own words, what does success mean to you? (Money, freedom, impact, lifestyle, legacy, etc.)



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# 2. Reflection: Volume vs. Value

How have you traditionally measured success?

☐

Volume funded

☐

Awards & recognition

☐

Profitability

☐

Client loyalty

☐

Other: \_\_\_\_\_

Do you feel your current measure of success is sustainable? Why or why not?



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# 3. Broker Tiers & Business Models

Which model best describes you today?



- ☐ Part-time broker (lifestyle focus)
- ☐ Solo high-performer (lean, profitable)
- ☐ Team leader (small but powerful group)
- ☐ Brokerage owner (building equity & scale)

What would you like your model to evolve into?



\_\_\_\_\_

## 4. Key Metrics to Track Beyond Volume

Rank the importance of each metric to your business

(1 = critical, 5 = less relevant):

- Profitability per file \_\_\_\_\_
- % of repeat/referral clients \_\_\_\_\_
- Business scalability (systems, delegation) \_\_\_\_\_
- Ability to operate without you \_\_\_\_\_
- Efficiency ratios (approval-to-funding, cost per deal) \_\_\_\_\_

Which of these do you currently track? Which do you need to start tracking?



\_\_\_\_\_