Appendix I: 30/60/90-Day Self-Assessment

At each milestone — 30 days, 60 days, and 90 days — Mason set aside time to check in with himself honestly. Not to judge where he was, but to see clearly. Charlotte told him early on: you can't lead a business you won't look at. This is the assessment she handed him before he walked out of her office that first Monday morning.

Why This Matters

Progress in real estate is easy to feel without being able to measure. This self-assessment replaces vague impressions with honest checkpoints. Answer based on what you are actually doing — not what you intend to do, not what you did last month. Honest answers here are the foundation of real adjustment.

Answer each section based on your current execution, not intention.

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30-Day Checkpoint: Foundation & Clarity

(Aligns with Part I — Chapters 1–7)

- ☐ I understand my burn rate and basic financial picture.
- ☐ My CRM is set up and used daily.
- ☐ Every contact has a next action assigned.
- ☐ I have established daily non-negotiables.
- ☐ My calendar reflects protected work time.

Reflection

What feels clearer than it did 30 days ago?

_____

_____

What still feels inconsistent?

_____

_____

One adjustment I will make next week:

_____

_____

60-Day Checkpoint: Flow & Systems

(Aligns with Part II — Chapters 8–13)

☐ My pipeline stages are clear and accurate.
☐ I follow a consistent buyer and seller process.
☐ I am using leverage appropriately — team, tools, or both.
☐ Follow-up happens without relying on memory.
☐ Weekly reviews guide my adjustments.

Reflection

Where has structure reduced stress?

_____
_____

Where am I still reacting instead of leading?

_____
_____

One system I will strengthen:

_____
_____

90-Day Checkpoint: Stability & Growth
(Aligns with Part III — Chapters 14–19)

☐ My activity is consistent regardless of market noise. ☐ I review metrics without avoidance.

☐ My time blocks are protected and realistic.

☐ Client experience remains steady during busy periods. ☐ I feel confident in my process and in the value I deliver.

Reflection

What has changed most in how my business feels?

_____

_____

What must be protected going forward?

_____

_____

One priority for the next 90 days: _____

_____

Consistency is not a personality trait. It is a decision you make — and remake — every 30 days. Keep checking in.