



2025-2026 AGENT RESET WORKBOOK

A Practical Self-Assessment for Agents Who Want
Clarity, Growth & Control Next Year

1. Your 2025 Business Snapshot

Quick, no-fluff look at where you stand right now.

PRODUCTION

Total
closed
volume: _____

Total
closed
units: _____

Total
GCI
earned: _____

Average
price
per
closing: _____

LEAD SOURCES (RANK BY EFFECTIVENESS)

1. _____
2. _____
3. _____
4. _____

WHERE YOUR TIME WENT

Prospecting: _____ hrs/week

Marketing/content: _____ hrs/week

Showings/clients: _____ hrs/week

Admin/operations: _____ hrs/week

HOW YOU FELT THIS YEAR

- | | |
|--|---|
| <input type="checkbox"/> Overwhelmed | <input type="checkbox"/> Hanging on |
| <input type="checkbox"/> Steady | <input type="checkbox"/> Growing |
| <input type="checkbox"/> Stuck | <input type="checkbox"/> Burned out |
| <input type="checkbox"/> Motivated but unsupported | <input type="checkbox"/> Ready for more |

2. Income vs. Effort Reality Check

Did your income grow this year?

- ☐ Yes ☐ No ☐ Barely

Did your workload grow?

- ☐ Yes ☐ No ☐ Stayed the same

Did you get the support you needed to grow?

- ☐ Yes ☐ No

IF YOUR INCOME DIDN'T GROW, WHY?

- | | |
|---|---|
| <input type="checkbox"/> Lack of leads | <input type="checkbox"/> Weak follow-up systems |
| <input type="checkbox"/> Little/no mentorship | <input type="checkbox"/> High fees/split |
| <input type="checkbox"/> Poor marketing | <input type="checkbox"/> No accountability |
| <input type="checkbox"/> Tech overwhelm | <input type="checkbox"/> Burnout/life |
| <input type="checkbox"/> Wrong environment | |

Write 1–2 honest sentences:

3. Brokerage Support Evaluation

Rate your brokerage 1–5 (1 = "Stinks"; 5 = "Awesome")

Lead Support:	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Mentorship:	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Broker Access:	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Marketing Support:	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Training Quality:	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Tech Tools:	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Transaction Support:	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Culture:	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Goal Alignment:	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>

Which areas held you back the most?

4. Your 2026 Goals & Priorities

WHAT DO YOU WANT MORE OF NEXT YEAR?

- | | |
|---|---|
| <input type="checkbox"/> Income | <input type="checkbox"/> Time freedom |
| <input type="checkbox"/> Better systems | <input type="checkbox"/> More listings |
| <input type="checkbox"/> Consistency | <input type="checkbox"/> Community |
| <input type="checkbox"/> Mentorship | <input type="checkbox"/> Simpler tech |
| <input type="checkbox"/> Accountability | <input type="checkbox"/> A clearer plan |

WHAT DO YOU WANT LESS OF?

- | | |
|--|---|
| <input type="checkbox"/> Fees | <input type="checkbox"/> Pressure |
| <input type="checkbox"/> Loneliness | <input type="checkbox"/> Guesswork |
| <input type="checkbox"/> Tech overload | <input type="checkbox"/> Broker silence |
| <input type="checkbox"/> Roller-coaster months | <input type="checkbox"/> Grinding without results |

TOP 3 GOALS

1. _____
2. _____
3. _____

5. Brokerage Comparison Scorecard

Category	Current	Option 1	Option 2
Split/Cap			
Monthly Fees			
Lead Support			
Marketing Help			
Mentorship			
Tech Stack			
Culture			
Brand Strength			
Alignment			
Net Take-Home			

Which brokerage aligns best?

6. If Nothing Changes...

If you stay where you are, what will your business look like next December?

Is that acceptable? ☐ Yes ☐ No

7. Your 30-Day January Jumpstart Plan

Week 1

- Rebuild database segments
- Clean CRM
- Identify top 100 SOI
- Reestablish weekly schedule

Week 2

- Relaunch weekly email
- Redo market update template
- Shoot 3 simple videos
- Build monthly content plan

Week 3

- Review expenses
- Set 2026 budget
- Identify "easy wins"

Week 4

- Meet with 2–3 brokerage options
- Complete scorecards
- Decide based on alignment, not hype

One thing you must change in 2026:

If You Want Support...

*"If you're evaluating options and want zero-pressure guidance, text or DM us.
Whether you stay or move, we'll help you choose the right environment."*



Sandy Jones



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Tim & Sandy Jones

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About Tim & Sandy

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At Jones Team Colorado, we're more than just real estate agents — we're your trusted neighbors, seasoned negotiators, and dedicated advocates from the first conversation to the final signature (and beyond). Based in the beautiful foothills west of Denver, we specialize in helping buyers and sellers navigate Colorado's unique real estate terrain — from mountain communities like Evergreen, Conifer, Pine, and Bailey, to sought-after city neighborhoods in Arvada, Lakewood, Littleton, Golden, Morrison, and beyond.

We're Tim and Sandy Jones — a husband-and-wife team with 26+ years of combined experience and a lifelong commitment to doing things the right way. With roots in both traditional values and cutting-edge strategy, we deliver expert advice, top-tier marketing, and genuine care that turns transactions into long-term relationships.

Over the years, we've also had the privilege of coaching and mentoring fellow agents — both within our local market and across the country. Several of those agents have chosen to partner with us at eXp Realty, where we continue to support their growth through hands-on guidance, real-world systems, and practical business planning. Helping agents build stronger, more consistent businesses has become one of the most rewarding parts of our career, and we take that responsibility as seriously as we take helping our clients.