



Q4 Boost: Techniques for Staying Motivated and Optimistic

Plaza Clients

October 2024

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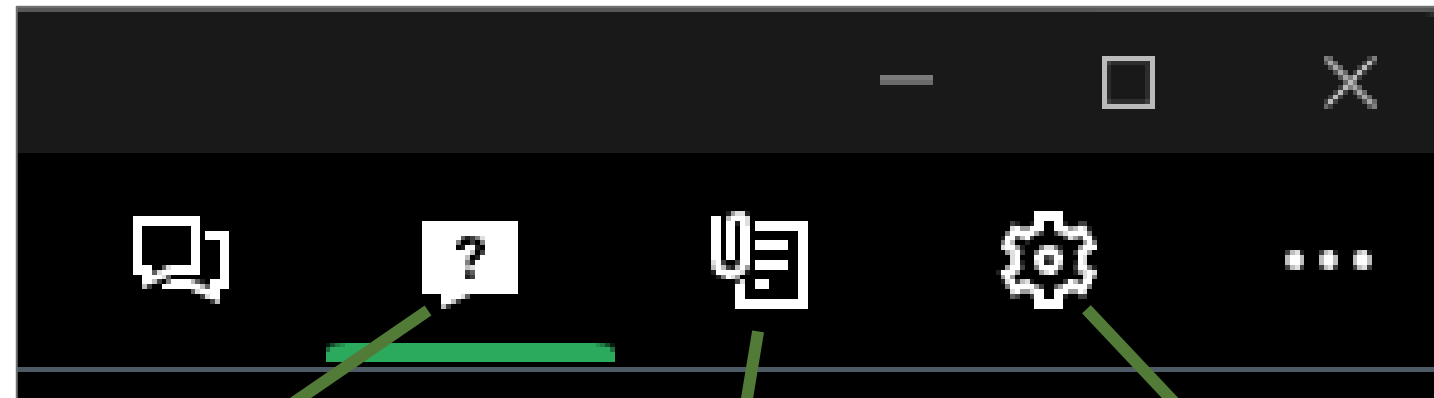


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Presenter



Lauren McCalmont
Training Specialist

Agenda



Benefits of Visualizing Goals



Daily Prioritizing and Triaging Tips

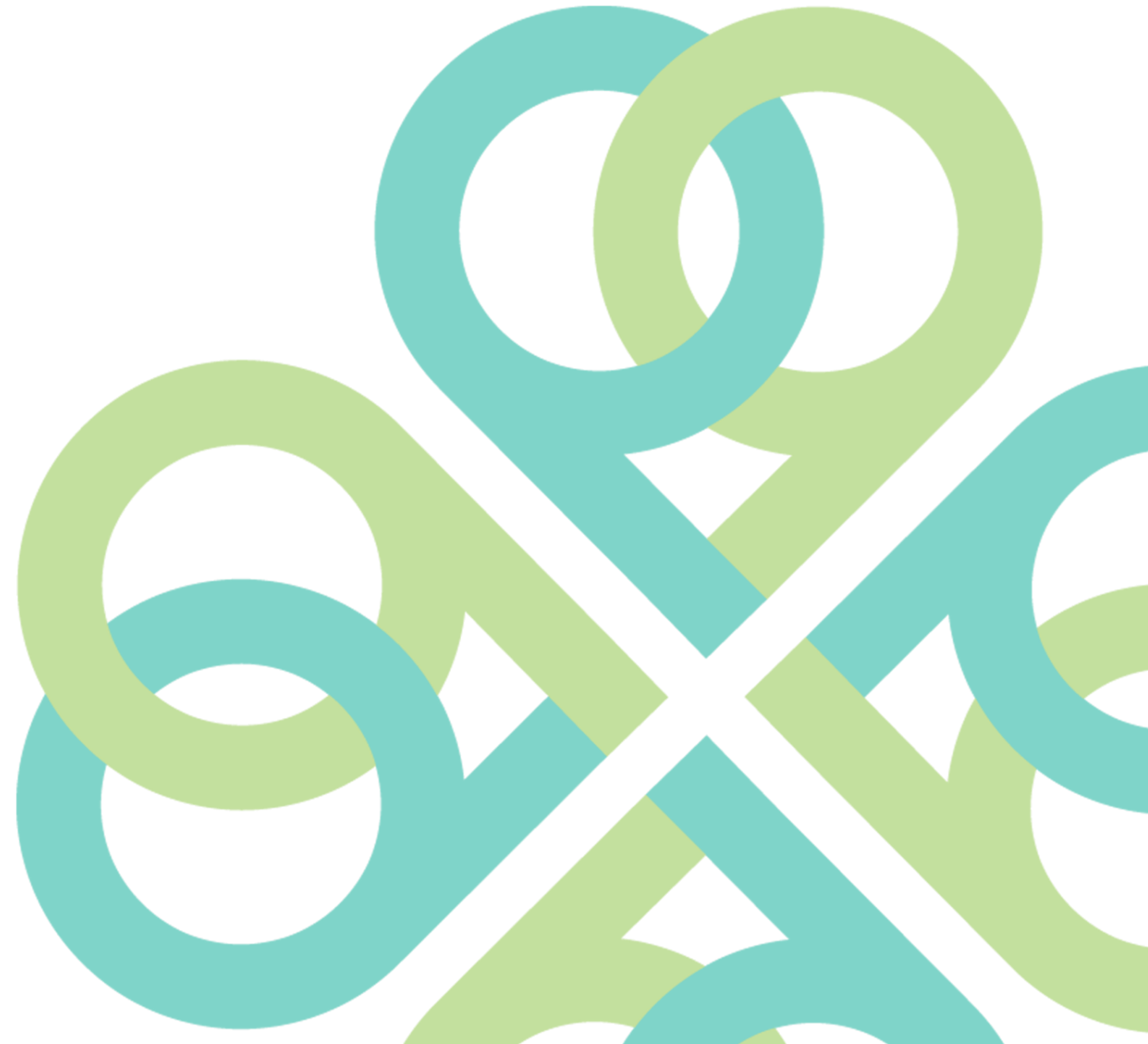


Developing a plan to finish strong



Key takeaway

Benefits of Visualizing Goals



Battle Board

Vision Board

War Board

Goal Board



Board Components



Lead With

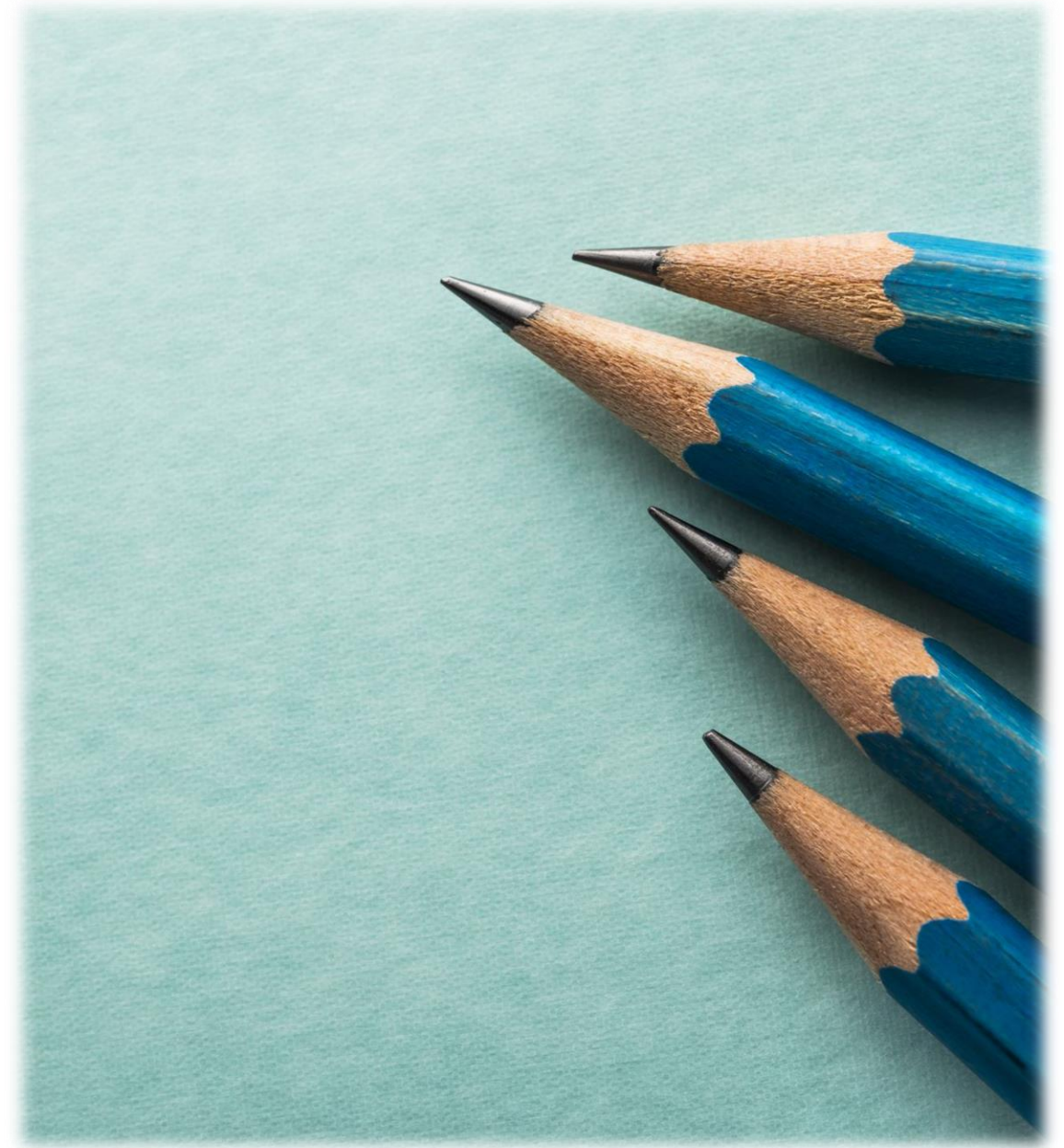
- Mission Statement
- 3-5 Words
- Values
- What Motivates You

Board Components

Start at the END

What were the goals you want to achieved by the end of 2024?

- Income goal
- # of loans closed
- # of new clients
- # of conferences attended
- # of posts of social media
- Professional development goal



October



Oct

Goals that have to happen

Metrics to achieve

Steps I am going to do

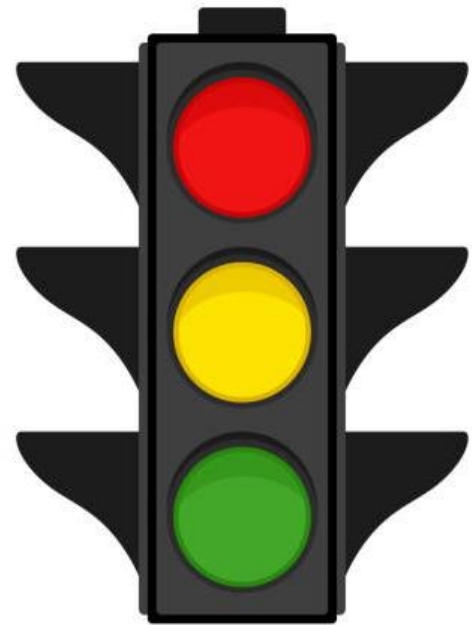
Key activities



TED

IDEAS WORTH SPREADING

Thoughtfully Triage



Intentionally Design

Decrease Temptations

A hand is shown holding a glowing lightbulb. Inside the lightbulb, several interlocking gears are visible, symbolizing technology, innovation, and forward thinking. The background is dark and out of focus, with some bokeh light effects. The text "Keep Looking Forward" is overlaid in the center in a white, bold, sans-serif font.

Keep Looking Forward



**Ask
yourself
these
questions**

Do you have a plan?

- Is your plan visible for you daily?
- Are you simply reacting to fires?
- Could you triage or prioritize the issues more?
- What is your plan for calls, email, social media, growth?
- How often do you reach out to prospective and existing clients?
- How do you plan to celebrate what you achieved?

Recap



Benefits of Visualizing Goals



Daily Prioritizing and Triaging Tips



Developing a plan to finish strong



Key takeaway

Key Takeaway

Please share with the group what will you takeaway from today's session



Social Media and Training at Plaza



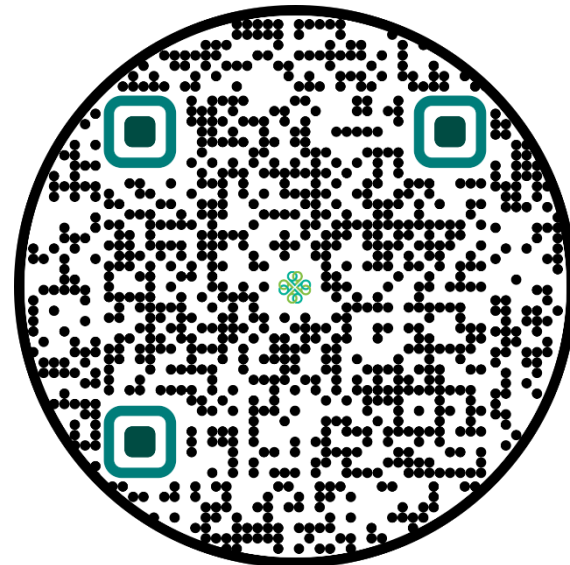
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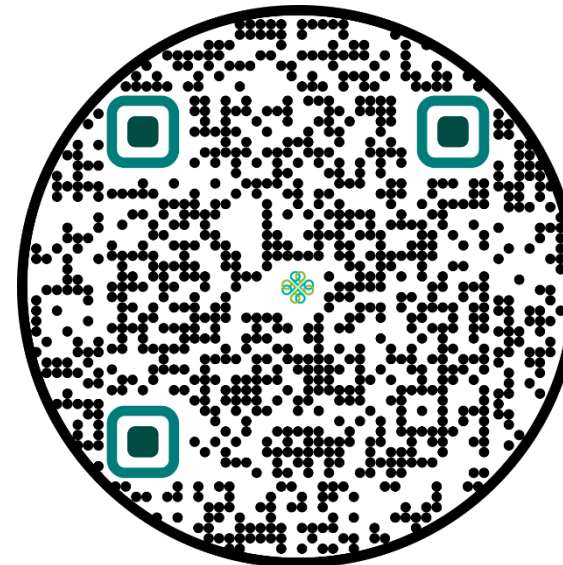
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