

MISSION + VISION STATEMENT DISCOVERY WORKSHEET

INTRODUCTION

Your mission and vision statements are the foundation of your real estate business. They guide your decisions, attract the right clients, and keep you focused on what matters most. This worksheet will help you discover your unique purpose and create powerful statements that drive your success.

Mission Statement: Describes what you do, who you serve, and how you do it (your present purpose)

Vision Statement: Describes where you want to be in the future and the impact you want to make (your future aspiration)

PART 1: SELF-DISCOVERY QUESTIONS

Your "Why" - The Foundation

Take time to reflect deeply on these questions. Write your honest, unfiltered thoughts.

1. Why did you become a real estate agent?

2. What do you love most about helping people with real estate?

3. What unique value do you bring that other agents don't?

4. What type of clients do you most enjoy working with?

Your Values and Beliefs

5. What are your top 5 core values? (Examples: integrity, excellence, family, community, innovation)

- 1.

- 2.

- 3.

- 4.

- 5.

6. What do you believe about the home buying/selling process that guides how you work?

7. How do you want clients to feel when working with you?

PART 2: YOUR IDEAL CLIENT PROFILE

Who You Serve Best

8. Describe your ideal client(s) in detail:

- Demographics: _____
- Life stage: _____
- Goals/needs: _____
- Values: _____

9. What specific problems do you solve for your clients?

10. What transformation do you help your clients achieve?

PART 3: YOUR UNIQUE APPROACH

How You Work

11. What is your unique process or approach to real estate?

12. What tools, technology, or resources do you use that set you apart?

13. How do you go above and beyond for your clients?

PART 4: YOUR FUTURE VISION

Where You're Going

14. In 5 years, what do you want your real estate business to look like?

15. What impact do you want to have on your community?

16. What legacy do you want to leave in real estate?

17. How do you want to be known in your market?

PART 5: CRAFTING YOUR MISSION STATEMENT

Mission Statement Formula:

We [what you do] for [who you serve] by [how you do it] so that [the result/benefit].

Step 1: Extract Key Elements

From your answers above, identify:

What you do (your service):

Who you serve (your target clients):

How you do it (your approach/values):

The result/benefit (what clients achieve):

Step 2: Draft Your Mission Statement

Combine the elements above into 1-2 sentences

Draft 1:

Draft 2:

Step 3: Refine Your Mission Statement

Choose your best draft and refine it. Make it clear, concise, and compelling.

Final Mission Statement:

PART 6: CRAFTING YOUR VISION STATEMENT

Vision Statement Formula:

To be [what you want to become] by [how you'll get there] creating [the impact you want to make].

Step 1: Extract Key Elements

From your answers above, identify:

What you want to become:

How you'll achieve it:

The impact you want to make:

Step 2: Draft Your Vision Statement

Create an inspiring picture of your future

Draft 1:

Draft 2:

Step 3: Refine Your Vision Statement

Choose your best draft and refine it. Make it inspiring and aspirational.

Final Vision Statement:

PART 7: TESTING YOUR STATEMENTS

Quality Check

Rate each statement on a scale of 1-5 (5 being excellent):

Mission Statement:

- Is it clear and easy to understand? ___/5
- Does it reflect your unique value? ___/5
- Would your ideal clients connect with it? ___/5
- Does it guide your daily decisions? ___/5

Vision Statement:

- Is it inspiring and motivating? ___/5
- Is it achievable yet challenging? ___/5
- Does it paint a clear picture of your future? ___/5
- Does it align with your values? ___/5

The Elevator Test

Can you recite both statements from memory in 30 seconds or less?

Practice saying them aloud. If they're too long or complicated, simplify them.

PART 8: YOUR FINAL STATEMENTS

Write your final mission and vision statements here:

Mission Statement:

Vision Statement:

EXAMPLES FOR INSPIRATION

Sample Mission Statements:

- "We guide growing families through seamless home transitions with personalized service and market expertise, so they can focus on making memories in their perfect home."
- "We empower first-time homebuyers with education, support, and advocacy throughout their journey, ensuring they make confident decisions in achieving homeownership."

Sample Vision Statements:

- "To be the most trusted real estate advisor in [City], known for turning the complex home buying process into an enjoyable journey that creates lasting relationships."
- "To build a real estate practice that transforms communities by helping 100+ families per year achieve their homeownership dreams while setting the standard for client service excellence."

NEXT STEPS

1. **Live with your statements** for 2-3 weeks
2. **Get feedback** from trusted colleagues, friends, or mentors
3. **Test them** in real conversations with prospects
4. **Refine** as needed based on how they feel in practice
5. **Integrate** them into all your marketing and business materials

Remember: Your mission and vision statements should evolve as you grow. Plan to revisit them annually to ensure they still reflect your purpose and aspirations.

