



20 YEARS STRONG • LIVE. LOVE. MORTGAGE.

CMS *GPS* DASHBOARD

Get Priorities Scheduled



CONNECT • ADVANCE • MOVE THE NEEDLE • PROTECT THE CALENDAR

PLAN • GROW • LEAD

NAME

YEAR

GENUINE INTEGRITY • RESILIENCE • OWN YOUR PATH
WORK AS FAMILY • THINK BIGGER • HOSPITALITY FIRST

LIVE. LOVE. MORTGAGE.

INDEPENDENT, NOT ALONE • SYSTEMS CREATE FREEDOM • NO RISK, NO REWARDS

WEEK OF: _____ NAME: _____

MY BIG WIN

FRIDAY 5 PM

If this week goes exactly as planned, what am I celebrating Friday at 5 PM?

WHO AM I SERVING THIS WEEK?

FOCUS

Client _____

Referral Partner _____

Team Member _____

Family _____

Community _____

G.R.O.W.T.H. COMPASS

VALUES

Genuine Integrity

Resilience

Own Your Path

Work As Family

Think Bigger

Hospitality First

My focus value this week: _____

CAMP
CONNECT •
ADVANCE •
MOVE •
PROTECT

Connect

 /10

Advance

 /10

Move the Needle

 /10

Protect Calendar

 /10

TARGET SCORE

40

MY TOP 5 PRIORITIES (MOVE THE NEEDLE)

EXECUTION

#	Priority (The Move)	Success Looks Like (Definition of Done)	Est. Time	Owner	Status
1					
2					
3					
4					
5					

WEEK OF: _____ NAME: _____

DAILY WINNING HABIT

1% BETTER

The ONE habit I will commit to strengthening this week:

M	T	W	T	F	S	S
---	---	---	---	---	---	---

My Commitment: Show up daily. Get 1% better.

ACCOUNTABILITY

CHECK-IN

Who needs to know my priorities? _____

Accountability partner? _____

Date of check-in: _____

WHAT COULD DERAIL ME?

PLAN

Potential derailers this week: _____

How will I respond if it happens? _____

CARE FRAMEWORK

SALES + OPERATIONS

SALES (PEOPLE FACING)

C	Connect	Who needs my attention?
A	Ask	What questions do I need answered?
R	Recreation	Who am I investing time into?
E	Explore	What opportunities have I not uncovered?

OPERATIONS (SYSTEMS FACING)

C	Capture	What information must be gathered?
A	Analyze	What does the data tell me?
R	Reconcile	What doesn't match?
E	Execute	What action is required?

NON-NEGOTIABLES

PROTECT

Faith

Health

Family

Deep Work

Growth

Relationships

SAY NO TO

PROTECT MY YES

To protect my YES, I need to say NO to:

1. _____
2. _____
3. _____

Genuine Integrity

We do the right thing, even when no one is watching.

Resilience

We adapt, overcome, and keep moving forward.

Own Your Path

We take ownership of our journey and create our future.

Work As Family

We support, respect, and celebrate each other.

Think Bigger

We challenge the status quo and pursue greatness.

Hospitality First

We create remarkable experiences.

NAME: _____ WEEK OF: _____

MY LEADERSHIP WIN

GROWTH

If this week goes exactly as planned, how will I have grown as a leader?

WHO I AM BECOMING

IDENTITY

Visionary

Mentor

Coach

Leader

Builder

Problem Solver

This week I commit to showing up as: _____

G.R.O.W.T.H. COMPASS

VALUES

Genuine Integrity

Resilience

Own Your Path

Work As Family

Think Bigger

Hospitality First

Focus Value This Week: _____

MY NUMBER

OWNERSHIP

Metric: _____

Goal: _____

Current: _____

Trend: ↑ Up → Flat ↓ Down _____

Why this matters: _____

MY TOP 3 PERSONAL STANDARDS

NON-NEGOTIABLE

1

2

3

NAME: _____ WEEK OF: _____

TO PROTECT MY YES

SAY NO

This week I will say NO to:

NO #1

NO #2

NO #3

"I will show up as the same person in every room, every day—grounded, honest, disciplined, and fully myself. I will honor my calendar, my commitments, my team, my clients, and the values that define CMS Mortgage."

KNOWLEDGE · IMPORTANCE · ACTION

GAP CLOSER

Knowledge Gap

What don't I know?

Importance Gap

What am I not prioritizing?

Action Gap

What am I not executing?

Selected Gap: Knowledge Gap Importance Gap Action Gap

Action to close the gap: _____

ONE PROBLEM I MUST SOLVE

CLARITY

WHAT I KNOW

WHAT I DON'T KNOW

WEEKLY DEBRIEF

REVIEW

BIGGEST WIN

BIGGEST LESSON

WHO DID I HELP GROW?

WHAT MOVES TO NEXT WEEK?

NOTES & REFLECTIONS

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DATE: _____

NAME: _____

KEY INSIGHTS & TAKEAWAYS

ACTION ITEMS FROM THIS WEEK

HOW AM I GROWING?

ADDITIONAL NOTES

NOTES & REFLECTIONS

LIVE. LOVE.
MORTGAGE.

DATE: _____

NAME: _____

WINS THIS WEEK

WHAT WOULD I DO DIFFERENTLY?

WHO DO I NEED TO CONNECT WITH?

OPEN NOTES

FULL NAME: _____

YEAR: _____

Genuine Integrity

Authenticity & Integrity: BE YOU

Encourage everyone to embrace their true selves, leading with honesty, transparency, and individuality.

CMSSGROWTH.

Who I Am Becoming & How I Show Up:

In _____, I commit to showing up as the same person in every room, every day—grounded, honest, disciplined, and fully myself.

Your Top 3 Personal Nonnegotiable Standards:

- 1 _____
- 2 _____
- 3 _____

Skills I Must Strengthen to Lead Through Challenge & Change:

- 1 _____
- 2 _____
- 3 _____

I Will Implement:

I Will Stop Doing:

Resilience

Resilience & Perseverance

Focus on overcoming obstacles, pushing through challenges, and continuously growing stronger as individuals and as a team.

CMSSGROWTH.

Skills I Must Strengthen to Lead Through Challenge & Change:

- 1 _____
- 2 _____
- 3 _____

I Will Implement:

I Will Stop Doing:

UNKNOWN ← KNOW

Knowledge Gap

Importance Gap

Action Gap

Training

Teaching

Talent

Expectations

Communication

Talent

Accountability

Commitment

Culture

FULL NAME: _____

YEAR: _____

Own Your Path

Ownership & Accountability

Take full responsibility for your journey and decisions. Each team member is empowered to own their work and drive results.

CMSSGROWTH.

Number I Own, Track, & Take Responsibility For:

Metric	Target
Funded Units	
Volume	
Avg Loan Amount	
Income	
Families Served	
Webinars Hosted	
Reviews Earned	

Inspiration without action is merely entertainment.

Work As Family

Collaboration & Connection

Foster a sense of belonging and togetherness, where collaboration and supporting one another are paramount. We're in this together like family.

CMSSGROWTH.

How We Grow Together Through Systems, Collaboration, and Trust:

1. Visibility Domination (Authority)

a. Short-Form Content: _____

a. Long-Form Content: _____

a. Reviews & Proof: _____

2. Webinars (Education + Filter)

a. Webinar Topics: _____

a. Frequency: _____

a. Booking Method: _____

3. Events (Staying on Top of Mind)

a. Email: _____

a. Text: _____

a. CRM Automation: _____

4. Accountability Partner: _____

Step 1
Here Is The
Issue

Step 2
Here Is

Step 3
Here Is

FULL NAME: _____

YEAR: _____

Think Bigger

Unstoppable Growth Mindset

Encourage a forward-thinking approach, always challenging limits and aiming for bigger goals, both personally and professionally.

CMSGROWTH.

Goals That Stretch Me, My Team, & My Impact:

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____
- 6 _____
- 7 _____

Hospitality First

Unreasonable Hospitality

Prioritize the experience of every client, team member, and partner by going above and beyond with empathy, care, and kindness in every interaction.

CMSGROWTH.

How I Consistently Serve Clients, Partners, & My Team at a High Level:

Webinars per Week	
Authority Posts per Week	
Conversations per Week	
Nurture Touches per Day	
System Improvement per Week	

1
Problem

Define the Issue

Identify Root Causes

3
Possible
Solutions

Brainstorm Options

Assess Impact

Consider Constraints

1
Immediate
Action

Evaluate Feasibility

Assess Effectiveness

FULL NAME: _____ YEAR: _____

SCHEDULE

WEEKLY

Time	Monday	Tuesday	Wednesday	Thursday	Friday
9 AM					
10 AM					
11 AM					
12 PM					
1 PM					
2 PM					
3 PM					
4 PM					
5 PM					

NON-NEGOTIABLES

IN MY SCHEDULE

	_____		_____
	_____		_____
	_____		_____
	_____		_____

NOTES & REFLECTIONS

LIVE. LOVE.
MORTGAGE.

DATE: _____

NAME: _____

MY CORE VALUES IN ACTION THIS WEEK

LEADERSHIP MOMENTS

GRATITUDE & RECOGNITION

ADDITIONAL THOUGHTS

NOTES & REFLECTIONS

LIVE. LOVE.
MORTGAGE.

DATE: _____

NAME: _____

END OF PERIOD REFLECTION

WHAT I'M MOST PROUD OF

WHAT I'M COMMITTING TO NEXT

CMS LEADERSHIP COMMITMENT

SIGNATURE

"I will show up as the same person in every room, every day—grounded, honest, disciplined, and fully myself. I will honor my calendar, my commitments, my team, my clients, and the values that define CMS Mortgage."

SIGNATURE _____

DATE _____