



Why Are We DOING This?

Getting Clear on the Vision for Your Association

Some Housekeeping:

1. Recordings
2. Questions
3. Introductions
 - Who are you?
 - What group are you with, where is it?
 - What's your role there?
 - What can you OFFER to other attendees?



Me:

Long-time investor

REIAGC volunteer since 1994

Served on state and national board

Started COREE in 2011

RMG since 2013, run since 2017

ED of Cincinnati REIA since 2018

Took both groups national in 2020

Yes, I am
insanely
passionate
about real
estate
associations

- Best, cheapest source of experience-based education
- ONLY source of ethics/legalities education
- Best place for grassroots lobbying and legal action
- A safe place to promote capitalism, freedom, success
- “My tribe”

The purpose of this training...

- Leaders helping leaders grow/solve problems
- Build/strengthen relationships between leaders
- Help build better, stronger, more prosperous associations
- Learn things I don't know

A person is shown from the side, carrying a large, heavy, rounded stone on their back. The person is walking on a path, and the stone is significantly larger than their torso, suggesting a heavy burden. The background is a plain, light-colored wall. The overall scene conveys a sense of struggle and difficulty.

Real Estate Associations are
Hard.

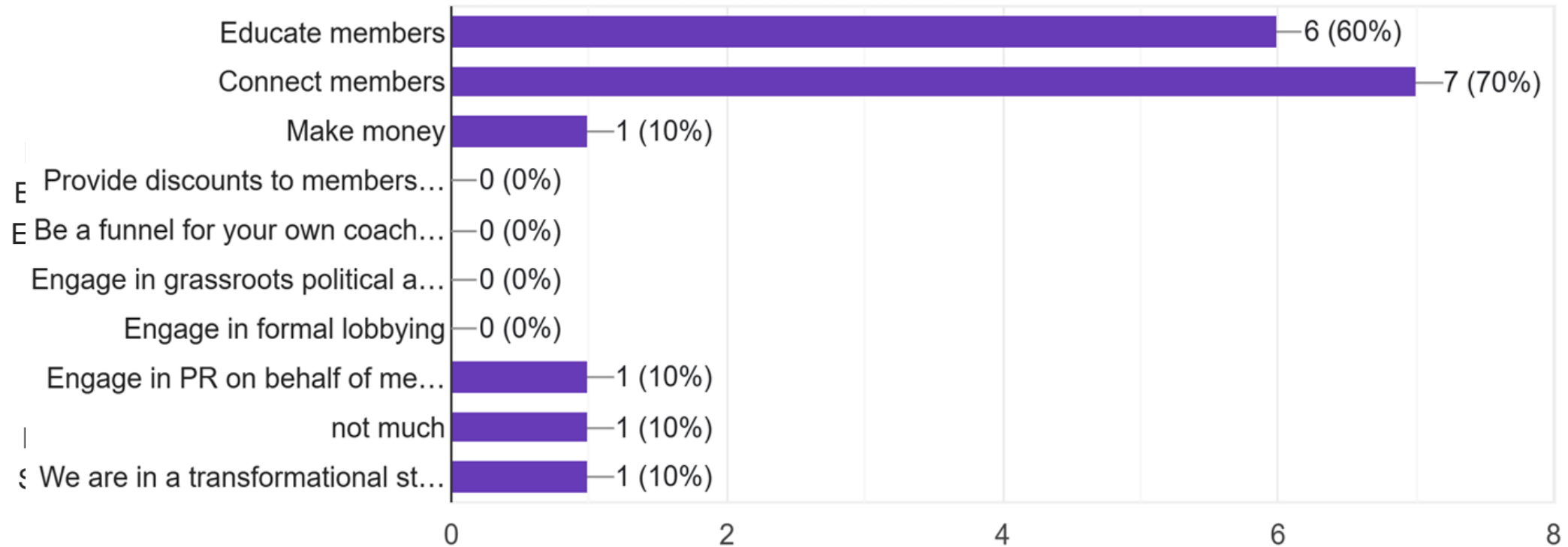
Maybe you've
had one of
these
experiences...

- Whack-a-mole
- “No one wants to step up and help”
- “That consultant we hired (or software we bought) turned out to be a waste...”
- “There are 12 of us, but 3 of us are doing all the work”
-

Because Here's What You SAID...

Which of those things does your group do WELL right now?

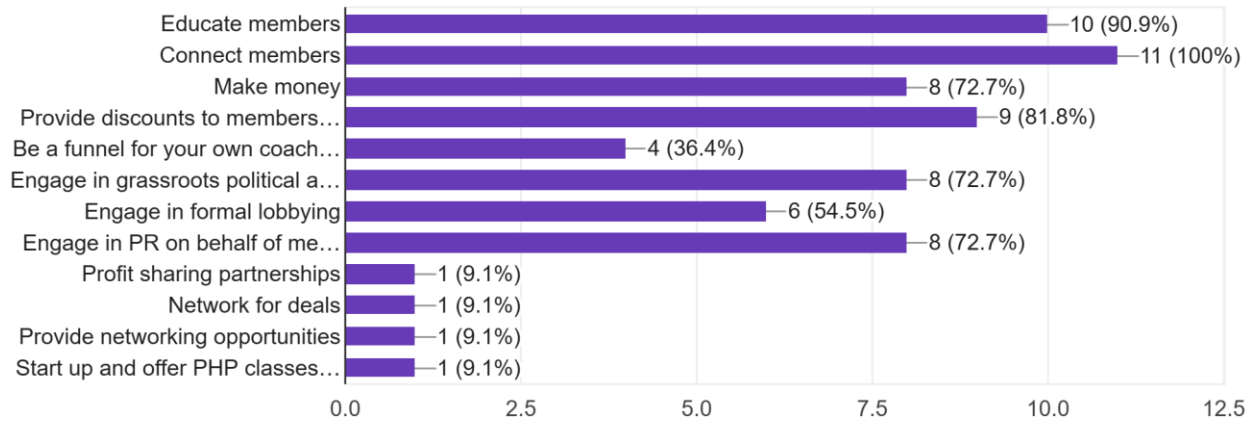
10 responses



Let's look at those side by side...

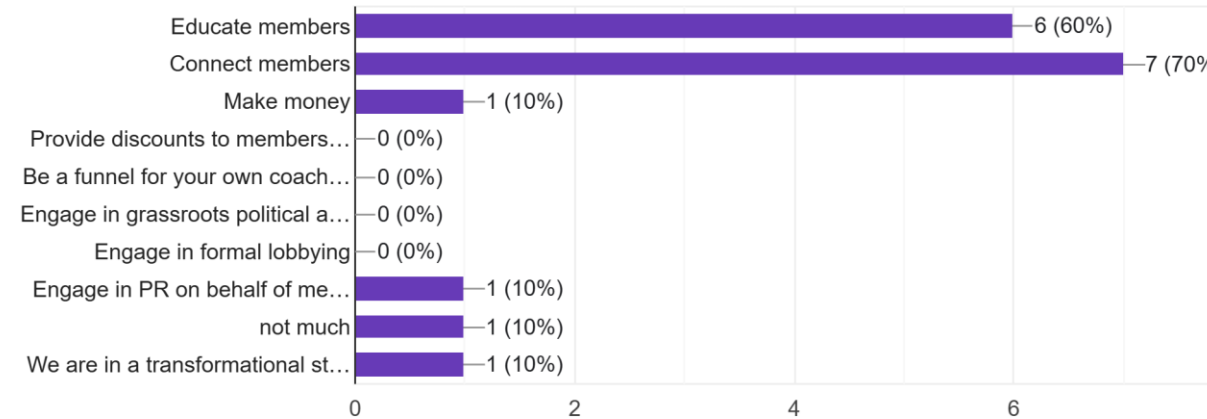
What are ALL the things that you'd like your group to do in a perfect world?

11 responses



Which of those things does your group do WELL right now?

10 responses



Survey Says...

Top priorities are:

1. Grow Membership
2. (tie) Make programming better or easier to run
3. Get more volunteers to help run the association

A 3D rendering of a puzzle. The background is composed of many grey puzzle pieces. In the center, one puzzle piece is a vibrant red color and is slightly raised above the others, making it stand out. The lighting creates soft shadows and highlights on the pieces, giving them a three-dimensional appearance.

Is it, though?

Or is the REAL problem in your
group something else?

Ask Yourself

1. How many of your 'goals' have been unreached for years on end?
2. How many have been reached at some point, but...?
3. How much of your leadership team's time is taken up running the trains and putting out fires...
4. vs. implementing new plans and improving the group

Ask Yourself

Would you RECOMMEND TO A FRIEND that they take on your role?

Are you having fun?



Here's What I Think...

You would NEVER start (or buy) a business without:

- A compelling why
- A clear understanding of who your customer is
- And what that customer REALLY wants

Here's What I Think...

You would NEVER start (or buy) a business without:

- Putting the right people in the right seats to do the jobs
- A short, medium, and long-term vision of “success”
- KPIs and KFIIs to track that vision against reality

Here's What I Think...

You would NEVER start (or buy) a business without:

- Systems and procedures that other people can implement
- A clear idea of how you'd replace yourself if you wanted to retire/quit/go do something else for a while

Or maybe you DO run your real estate business that way...

- Taking whatever customer comes to you
- Doing every single thing yourself
- No real ability to grow/expand
- On the verge of burnout all the time...



(if that's you,
I'd like to
recommend
a book)

Bringing the Dream Back to Small Business Worldwide!

MORE THAN
TWO MILLION
COPIES SOLD!

The E Myth
Revisited

Why Most Small
Businesses Don't Work
and What to Do About It

MICHAEL E. GERBER

The World's #1 Small Business Guru

Bottom Line:

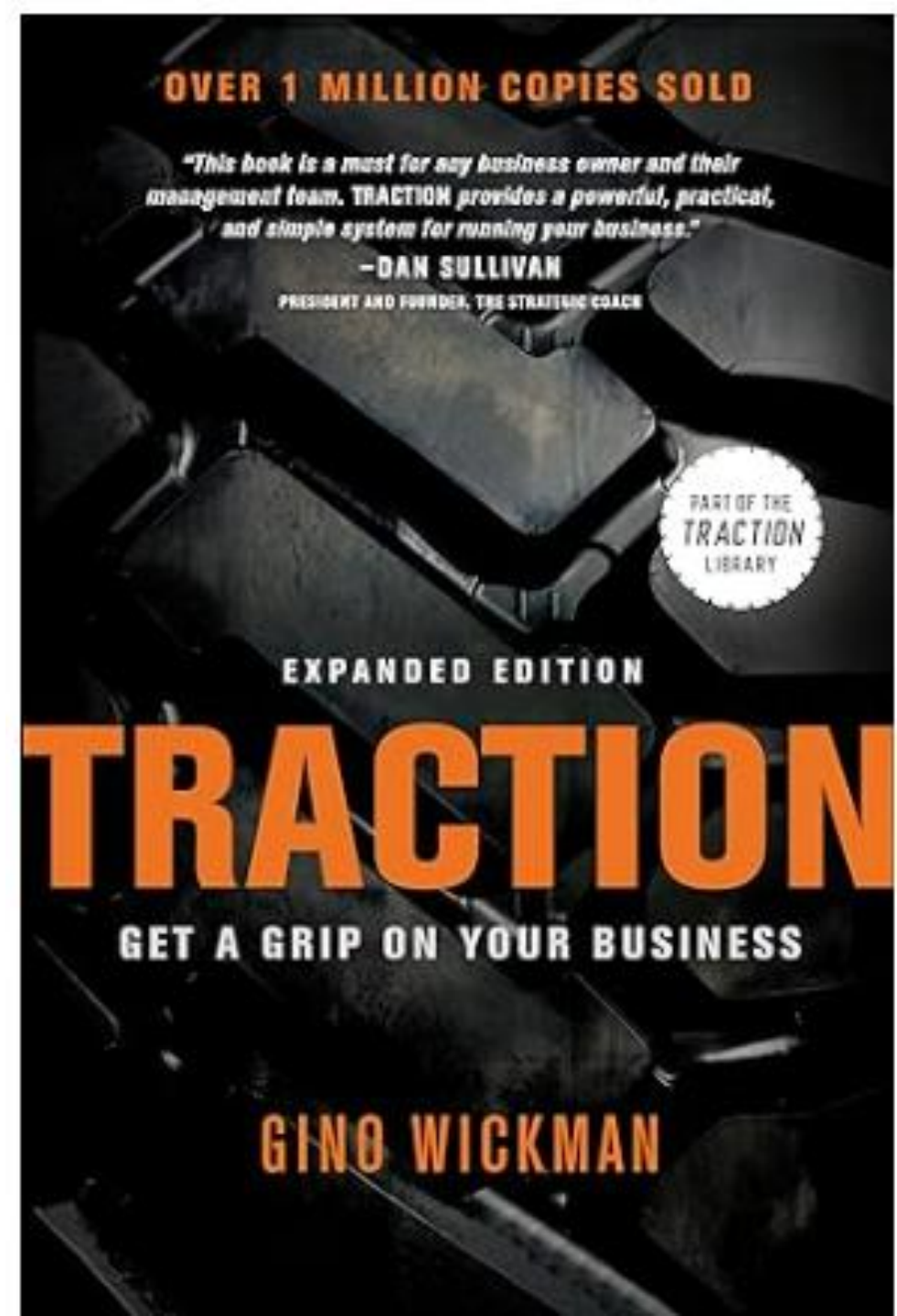
We don't apply what we know about running a successful business...

To our associations.

That's the real, underlying problem.

Prove me wrong.

Read This Book. Give
it to Your Entire
Leadership Team. Do
What it Says.



Here's the High-Level Overview...

Your association needs a set of defined, shared values, like:

1. The pie is big enough
2. Constant commitment to education and improvement
3. Always ethics
4. Freedom of time, money, lifestyle
5. Always take an opportunity to help



Here's the High-Level Overview...

Your leaders need to be clear on:

- The purpose of the group (and what it **DOESN'T** do)
- Who it serves (and who it doesn't)



What it looks like when
it's exactly like we want it

AKA “The 10 year
picture”

A glass jar containing several lit sparklers sits on a dark, textured surface. The background is dark with out-of-focus blue and white bokeh lights. The text "What the BIG VISION is" is overlaid in white, with "BIG VISION" in all caps. A horizontal white line is positioned below the text.

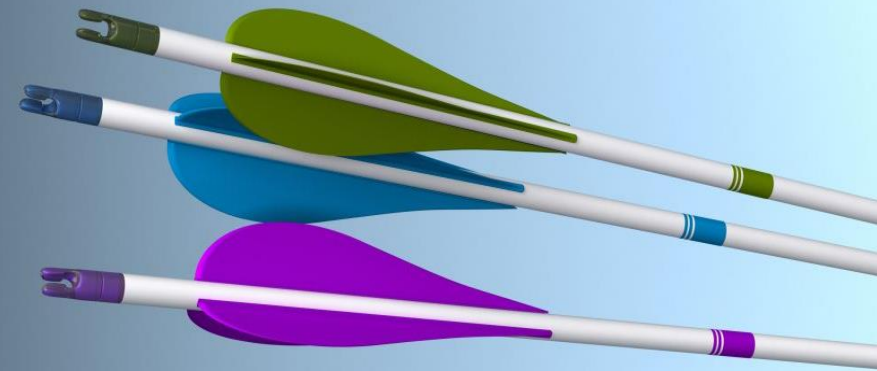
What the **BIG VISION** is

That we're all driving toward

Traction Recommends 3 Visions:

1. The 10 year “target”

- A big, hairy audacious goal
- Inspiring to all the stakeholders
- But stated very briefly
- “COREE will be the most largest, most influential association in the U.S., will have benefits for investors at every level and in every strategy, and will be a \$100,000,000 business”



2. The 3 Year “Picture”

- Includes financials:
 - How much revenue?
 - How much profit?
- measurables:
 - How many members?
 - How many attend each meeting?
 - How many renew each year?

But Also What it LOOKS LIKE:

- Completely professionally managed, with board only setting policy and direction and hiring and firing managers
- Programming/educational resources available on demand to help people get up to speed on basics, quickly
- No city, county, or other local regulator dares pass housing-related issues without consulting us
- Systems in place to smooth transitions between managers, boards, focus group leaders etc.
- Clear, communicated culture and values

The 1 year PLAN

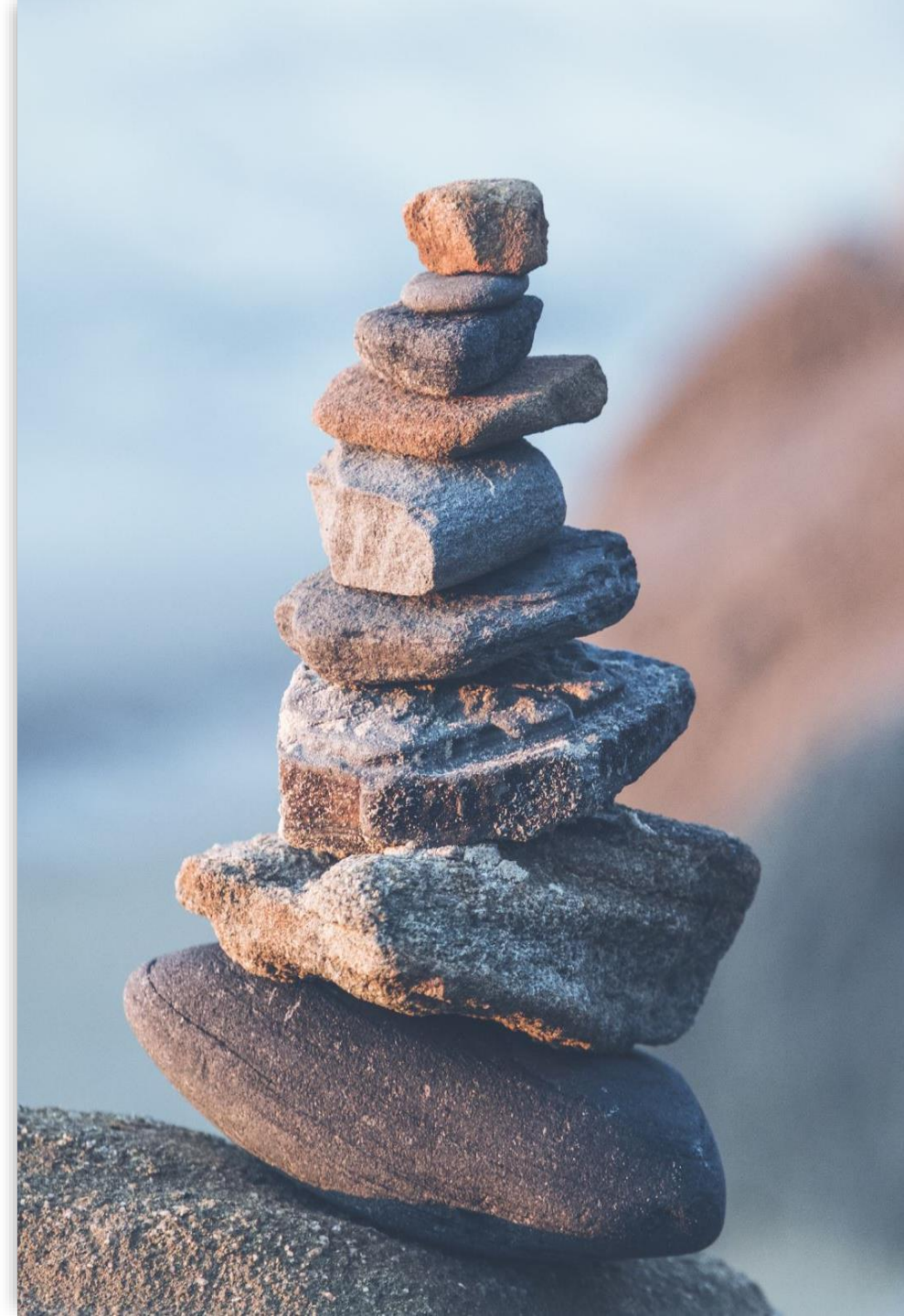
- Revenue, Profit Goals
- Other Key Performance Indicator Goals
 - Number of members
 - Meeting attendees
- And a (small number) of quarterly “rocks” that will get you 1/3rd of the way to the 3-year plan

Let's talk about those "Rocks"

- They're things that will make other things permanently easier
- Or permanently solve problems

NOT:

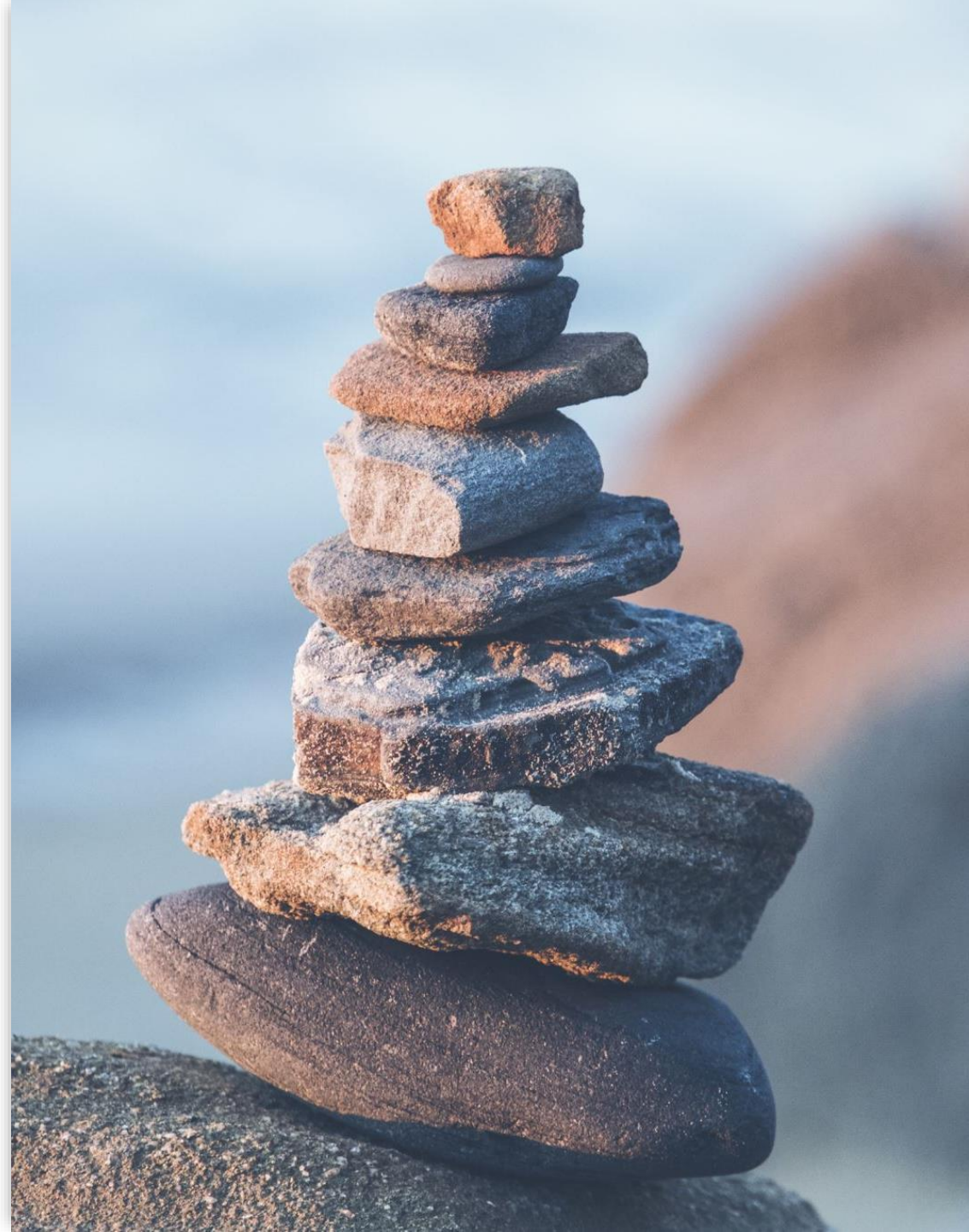
- A normal course of operations goal ("Have 12 great meetings")
- A simple task ("Sign new contract with meeting place")



Let's talk about those "Rocks"

But are more complex "Important but not urgent" projects that will actually make some aspect of group better:

- "Define the role of vendor coordinator, write policies and job description, and hire one"
- "Research possible membership sites, pick on, implement it, and cross-train people to run it"
- "Create, systemize, and implement a retention funnel for members"



Be careful...

- Only 1 rock per quarter per person
- Don't assign rocks to people who won't/can't see them through
- Create a regular way for rock holders to report on progress (weekly is best)





These visions are important...

- **EVEN THOUGH** the next board or owner may have a completely different vision for the group
- **EVEN THOUGH** you have no idea what real estate or the economy will look like in 1, 3, or 10 years



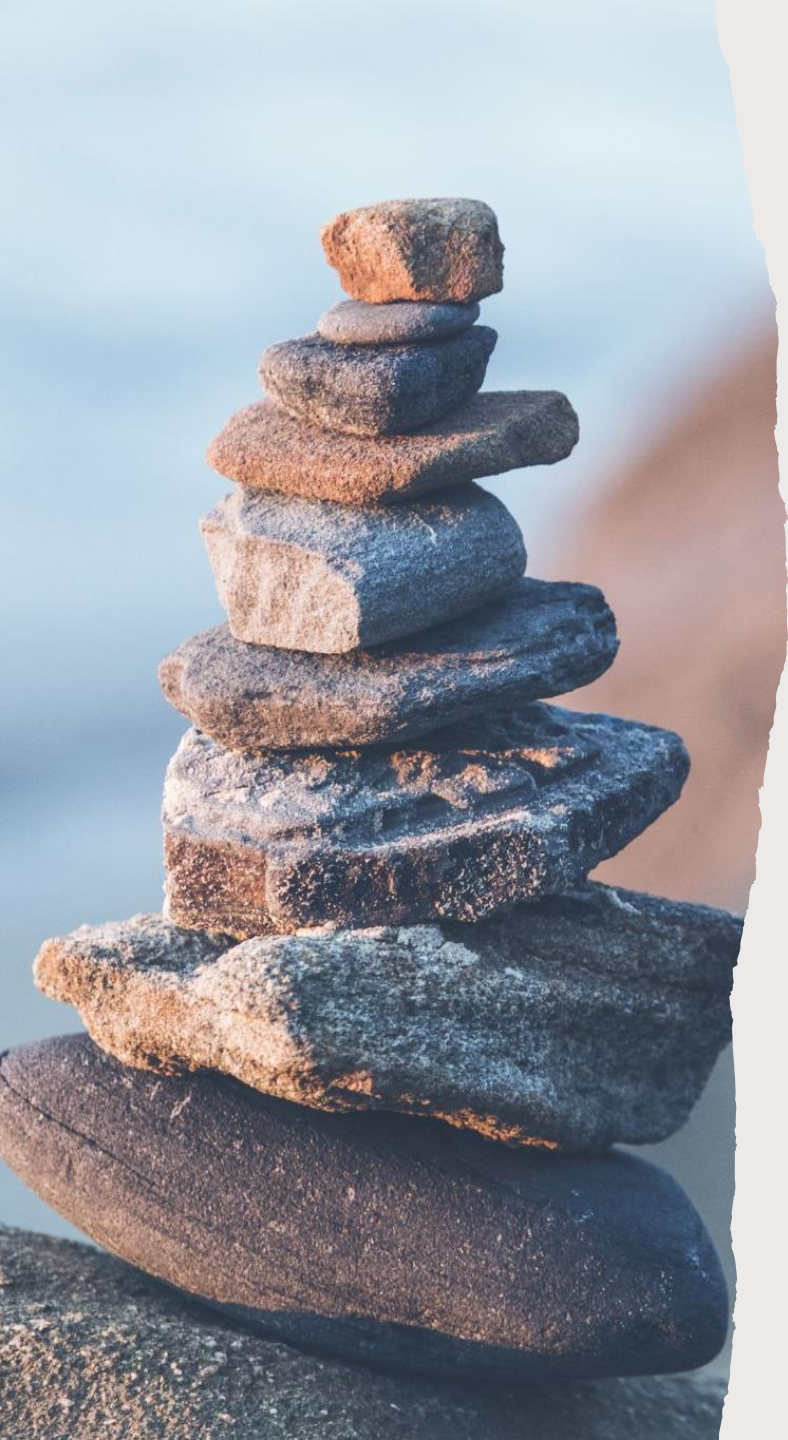
But they're useless unless...

- [they align with the group's core values and niche and focus]
- You review the vision regularly
- You set the right rocks and focus on doing those, even as the whirlwind rages
- You have buy-in from the management team



Practical ways to start this process

- A day long or 2-day long retreat
- With the defined outcome of “We’re creating a vision for what we want this group to really be”
- A “Burn it down” exercise can be valuable
- An outside moderator can be valuable



There's lots of brainstorming here...

- “If time, money, and people were no object, what would we like to be able to say about our group in 10 years?”
- “If time, money and people were no object, what are ALL the ways we'd like to look in 3 years?”
- “What are all the things we need to do this year in order to get 1/3rd of the way to our 3-year picture?”



And always be asking...

- Why? Why? Why?
- How does that fit with our core values? Our purpose?
- What needs to be put into place, that we don't have in place now, to reach these?
- How does it inform our rocks?



Who's already thinking:
"That Won't Work for My
Group..."