Agent Morning Report — Setup Guide

This guide is designed for new agents like AL to set up their Morning Report inside Serenity OS. The Morning Report is the daily engine that delivers focus, motivation, and actionable steps in less than 5 minutes each morning.

1. Core Components of the Morning Report

1. Personal Section: Your affirmation or guiding principle (optional, but highly recommended).
2. Active Core Tracks (4 max): Your live projects or focus areas. These appear daily.
3. Static Spotlight (4 quick-pulls): Shared SOPs, playbooks, or reference tools (the brokerage defaults).
4. Passive/Archive Tracks: Background items not shown daily, but retrievable on demand.

2. Daily Flow of the Morning Report

1. Positive Opening Line: A motivational or uplifting start to the day.
2. Personal Section: Your affirmation or daily reminder (e.g., 'This year is going to be my best year.').
3. Cannabis-Free/Health Tracker (optional toggle).
4. Active Core Tracks: Updates, outputs, or automations tied to each Track.
5. Static Spotlight: Quick-access references (always the same 4 across the brokerage).
6. Closing Reminder: Focus on today’s top priority.

3. Getting Started — AL’s First Steps

1. Step 1: Define your personal affirmation (optional).
2. Step 2: Choose up to 4 Active Core Tracks (examples: New Listings, Buyer Pipeline, Kristine Program).
3. Step 3: Lock in the 4 Static Spotlight items (provided by the brokerage).
4. Step 4: Review your first Morning Report the next day. Make adjustments as needed.
5. Step 5: Build consistency — review your Morning Report daily. It only takes 5 minutes.

4. Why the Morning Report Works

The Morning Report removes guesswork. Instead of wasting time deciding what to do, you start each day with focus, direction, and momentum. In one hour of setup, AL will have a system that runs automatically, sharpening focus and delivering results daily.