Appendix A: Agent Priority & Time Management Worksheet

The Real Estate Eisenhower Matrix

This is the worksheet Charlotte handed Mason in Chapter 5 — the one she tapped on the table and said, "If it isn't scheduled, it isn't protected." He kept it on his desk from that week forward.

Why This Matters

Not all tasks are created equal, and your calendar will fill itself if you let it. This matrix helps you separate what demands attention now from what builds your business over time — and stops you from confusing busyness with productivity. As Mason learned in Chapter 5 (The Rhythm of the Day) and again in Chapter 14 (The Calendar War), protecting your time isn't a luxury. It's the job.

Use this worksheet at the start of each week to sort your workload, assign your energy deliberately, and keep the business-building work from getting crowded out by the urgent.

IMPORTANT
URGENT
NOT URGENT
NOT IMPORTANT
Q1: DO NOW
Deal Protectors
Offer deadlines
Inspection issues
Active negotiations
Hot buyers/sellers
Q2: SCHEDULE
Business Builders
Lead generation
Sphere follow-up
CRM maintenance
Market analysis
Q3: DELEGATE
Leverage Opportunities
Scheduling showings
Transaction paperwork
Data entry
Social media posting
Q4: REVIEW
Time Leaks
Endless searches
Tire kickers
Busywork disguised
as productivity

Q1: DO NOW — Urgent & Important (Deal Protectors)

Handle immediately. These are active, time-sensitive situations where delay has real consequences.

Examples

- Offer deadlines
- Inspection or appraisal issues
- Active negotiations
- Hot buyers or sellers ready to act

Your Q1 Tasks This Week

_____
_____
_____
_____

Q2: SCHEDULE — Important, Not Urgent (Business Builders)

Block time on your calendar. This quadrant builds your future — and it will always lose to Q1 if you don't protect it in advance.

Examples

- Lead generation
- Sphere follow-up
- CRM cleanup
- Market analysis
- Client events planning
- Mail farming prep

Your Q2 Priorities This Week

_____

_____

_____

Time Block Scheduled: ☐ Yes ☐ No ☐ Needs Adjustment

Q3: DELEGATE — Urgent, Not Important (Leverage Opportunities)

Systematize or hand off. These tasks feel productive but don't require your specific expertise. Build the habit of passing them down.

Examples

- Scheduling showings
- Transaction paperwork coordination
- Data entry
- Social media posting

Tasks to Delegate or Systematize

_____
_____
_____

Who or What Handles This? ☐ CCC / TC ☐ Automation ☐ SOP ☐ Outsource

Q4: REVIEW — Not Urgent, Not Important (Time Leaks)

Minimize or eliminate. These are the activities that feel like work but don't move the needle. Name them so you can see them clearly.

Examples

- Endless home searches without defined criteria
- Tire kickers without commitment or timeline
- Busywork disguised as productivity

Activities to Limit or Eliminate

_____
_____
_____

Weekly Focus Check

Top 3 High-Value Actions This Week *(The 20% that creates 80% of your results)*

_____
_____
_____

Daily Non-Negotiables☐ Conversations ☐ Follow-up ☐ CRM updates ☐ Client care

___

Reflection (End of Week)

What worked well this week?

_____

_____

What felt reactive instead of intentional?

_____

_____

What will I protect on my calendar next week?

_____

_____

If it isn't scheduled, it isn't protected. If it isn't important, it shouldn't steal your best hours.