Appendix C: Daily Routines & Weekly Blocks (Leader Coaching Version)

This is the framework Charlotte used with every agent she developed — including Lily. She didn't coach effort. She coached structure. The conversations she had weren't about working harder. They were about building the scaffolding that makes consistent performance possible.

Purpose

Inconsistency in agents rarely comes from lack of effort — it comes from lack of structure. This worksheet is a coaching tool for team leaders, Directors of Operations, and coaches who are helping agents move from reactive to intentional. Use it in weekly one-on-ones to diagnose where structure is breaking down, identify delegation opportunities, and make specific, accountable commitments for the week ahead.

Agent Name: _____

Week of: _____

Daily Routine Assessment

Does this agent have a repeatable, protected daily operating rhythm?

- ☐ Has a defined morning start time and process
- ☐ Uses CRM daily — not occasionally
- ☐ Logs notes consistently and same day
- ☐ Assigns a next task for every contact, every time

Coach Notes:

Weekly Block Review

Business-Building Time

☐ Clearly scheduled on the calendar

☐ Protected from showings and admin overflow

☐ Actually honored — not just planned

Coach Prompt: *"Which blocks move the business forward even when nothing is urgent?"*

Agent Response:

_____

_____

Client Execution Load

☐ Appropriate for current pipeline size

☐ Not crowding out Q2 / business-building work

Coach Prompt: *"What would break first if your volume doubled tomorrow?"*

Agent Response:

_____

_____

Operations & Review Habits

☐ CRM maintained and current

☐ Files clean and compliant

☐ Metrics reviewed regularly

Coach Prompt: *"Where are you relying on memory instead of systems?"*

Agent Response:

_____

Pareto Coaching Check

Top 20% Actions Identified by Agent

_____

_____

_____

Coach Observation: ☐ Accurate ☐ Needs refinement

Notes:

_____

_____

Delegation & Leverage Check

What is this agent still doing that someone else could handle?

☐ Transaction coordination

☐ Scheduling

☐ Data entry

☐ Marketing execution

Coach Prompt:*"What are you doing right now that someone else could do better, faster, or more consistently than you?"*

Agent Response:

_____

_____

Next-Week Commitments

One specific habit to protect: _____

One specific block to defend: _____

One system to strengthen or document: _____

You don't coach effort. You coach structure. Structure creates consistency. Consistency creates confidence — and a business that doesn't depend on heroics to survive.