Appendix B: Daily Routines & Weekly Blocks Worksheet (Agent Version)

This is the rhythm Mason built block by block through Parts I and II — the daily structure that kept him moving forward even when deals stalled, clients panicked, and the market shifted. It didn't look glamorous. It just worked.

Why This Matters

A business built on consistency beats one built on bursts of effort every time. The problem isn't motivation — it's structure. When your daily and weekly calendar has clear, defended blocks for the right activities, you stop relying on willpower to decide what to do next. You already know. This worksheet, rooted in Chapter 5 (The Rhythm of the Day), is the daily and weekly operating rhythm for agents who want to build something that holds.

Use it as a fillable guide each week. The goal isn't perfection — it's return.

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Daily Non-Negotiable Routine

This happens every business day, no matter what. These are the floor, not the ceiling.

Morning Focus (Before Distractions)

☐ CRM review — what's active, what's due, what needs attention today
☐ Check tasks and follow-ups — clear and prioritize
☐ Review pipeline and priorities — know your day before it knows you

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Daily Lead & Relationship Actions

☐ Conversations (calls, texts, face-to-face) talk to real people every day
☐ Sphere / warm touches — stay present in the lives of people who trust you
☐ Log notes and assign next task in CRM — never leave a contact without a next step

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Client Care

☐ Active client updates — proactive outreach before they have to ask
☐ Contract or listing check-ins — know the status before your client does
☐ Problem prevention (not firefighting) — anticipate, don't react

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Daily Admin Close-Out

☐ Update CRM — same day, every day
☐ Clear inbox — handle, delegate, or delete
☐ Prep for tomorrow — set yourself up to win the morning

Estimated Daily Time Commitment: ☐ 60 min ☐ 90 min ☐2+ hrs

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Weekly Time Blocks

Block these on your calendar. Defend them. If something can move, it moves — these don't.

Business Building Blocks

- ☐ Lead generation
- ☐ Sphere nurturing
- ☐ Market research
- ☐ Marketing prep

Day(s): _____

Time(s): _____

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Client Execution Blocks

- ☐ Showings
- ☐ Consultations
- ☐ Negotiations
- ☐ Listing appointments

Day(s): _____

Time(s): _____

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Operations & Review

- ☐ CRM cleanup
- ☐ File and compliance check
- ☐ Metrics review

Day(s): _____

Time(s): _____

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Pareto Check (80/20 Rule)

Top 3 Actions That Drive Most of Your Results

_____
_____
_____

Low-Value Tasks to Reduce or Delegate

_____
_____
_____

End-of-Week Reflection

What stayed consistent?

_____

_____

Where did I lose focus or time?

_____

_____

What will I protect on my calendar next week?

_____

_____

Consistency is more important than intensity. Show up the same way on the slow weeks as you do on the busy ones — that's what builds a business that lasts.