



DAILY CHECKLIST



ESSENTIAL TASKS FOR SUCCESS

Workday Wind-Up *(All should be done prior to starting income-producing activities)*

- Open all windows & systems needed for the day:
 - CRM
 - MLS
 - Monthly Goals Spreadsheet
 - Any additional necessary windows/systems
- Email & Text Audit - reply to anything outstanding from last night
- Review daily goals from spreadsheet
- Review today's calendar events - make time to prep if necessary

Daily Essentials *(All should be done by the time you log off for the day)*

- Minimum 10 conversations per day (phone or face-to-face, not text)
- Minimum 10 social media interactions per day (comments, sharing, PM, etc.)
- Minimum 1 social media post per day
- Minimum 100-200 dials per day (500-1,000 per week)
- Lead Follow-Up
- Lead Generation
- Check Active Listings For Buyers
- Wednesday:** Schedule open houses
- Friday:** Submit Self-Accountability Form
- Weekly:** Minimum One 1-1 With People From Lead Buckets and SOI

Workday Wind-Down *(Do this once everything above is completed)*

- CRM Wrap-Up (add contacts, notes, calls, etc. that weren't logged throughout the day)
- Review tomorrow's daily goals (spreadsheet)
- Update accountability sheets based on today's actions
- Email & Text Audit - reply to anything outstanding from the day
- Move unfinished items (calendar events, tasks, spreadsheet goals) to another date/time