

Daily Schedule	Activities	Tutorial	Mon	Tues	Wed	Thurs	Fri	Notes
Dashboard Review (15 minutes)	<ul style="list-style-type: none"> Review new contacts/leads, group accordingly, create a follow-up plan, and write down any notes Reach out to upcoming birthdays for the week Review activity stream/emails that have been opened Finish any outstanding tasks for the day 	<ul style="list-style-type: none"> Dashboard overview Contact record deep dive Contact management Managing groups Reviewing your activity stream Client birthdays 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Pre-Approval Follow-Ups (30 minutes)	<ul style="list-style-type: none"> Follow-up with expiring pre-approvals Touch base with any clients who are pre-approved but haven't found a home yet Create a repeatable playbook for staying on top of your pre-approved clients 	<ul style="list-style-type: none"> Pre-approval playbook 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Referral Partners	<ul style="list-style-type: none"> Create resources for your agents' new listings Make 2-3 agent calls (prospective or current agents) and log outcomes Invite 1 new co-marketing partner per week 	<ul style="list-style-type: none"> Support agent listings Tracking agent relationships Send CMP invite 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Monthly Marketing	Activities	Tutorial	Wk. 1	Wk. 2	Wk. 3	Wk. 4	Wk.5	Notes
Weekly Database Email	<ul style="list-style-type: none"> Send three emails a month to different parts of your database: <ul style="list-style-type: none"> Leads/prospects Past clients Agents or partners 	<ul style="list-style-type: none"> Agent email Managing groups Creating pipeline views 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Social Media	<ul style="list-style-type: none"> Schedule 3-4 social media posts for the month 	<ul style="list-style-type: none"> Schedule social media posts MLS listing social posts 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Referral Partners	<ul style="list-style-type: none"> Set up 2-3 face-to-face agent meetings this month 	<ul style="list-style-type: none"> Agent meetings 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	