TotalExpert LO Success Plan

Daily Schedule	Activities	Tutorial	Mon	Tues	Wed	Thurs	Fri	Notes
Dashboard Review (15 minutes)	• 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	• Dashboard overview • Contact record deep dive • Contact management • Managing groups • Reviewing your activity stream • Client birthdays	❑	❑	❑	❑	❑	
Pre-Approval Follow-Ups (30 minutes)	• 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	• Pre-approval playbook	❑	❑	❑	❑	❑	
Customer Intelligence Alerts (30 minutes)	• Review Customer Intelligence tasks – make calls and log outcomes • Review rate opportunities – make phone calls, texts, or emails, and log outcomes • Review equity opportunities –make phone calls, texts, or emails, and log outcomes	• Managing your CI tasks • Refi opportunities • Equity opportunity lists	❑	❑	❑	❑	❑	
Referral Partners	• 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	• Support agent listings • Tracking agent relationships • Send CMP invite	❑	❑	❑	❑	❑	
Monthly Marketing	Activities	Tutorial	Wk. 1	Wk. 2	Wk. 3	Wk. 4	Wk.5	Notes

Weekly Database Email	• Send three emails a month to different parts of your database:
	    • Leads/prospects
	    • Past clients
	    • Agents or partners
		• Agent email
		• Managing groups
		• Creating pipeline views
			❑	❑	❑	❑	❑	

Social Media	• Schedule 3-4 social media posts for the month	• Schedule social media posts • MLS listing social posts	❑	❑	❑	❑	❑	
Referral Partners	• Set up 2-3 face-to-face agent meetings this month	• Agent meetings	❑	❑	❑	❑	❑	