

20

G.O.A.L.S.

22

*planner*



## ACCOUNTABILITY PLANNER & COMMUNITY FOR THE WORKING-BY-REFERRAL REAL ESTATE AGENT

### **GROWING**

VISUALIZE THE LIFE YOU WANT, ESTABLISH THE STEPS, EXECUTE THE PLAN,  
TRACK THE PROGRESS, AND NEVER STOP DREAMING BIGGER.

### **ORGANIZATION**

CLEAR YOUR DESK, CLEAR YOUR MIND.  
KNOWING WHAT TO DO, WHERE TO GO, AND  
HOW IT WILL GET DONE IS HALF THE BATTLE!

### **ACTION**

FOCUS ON INTENTIONAL PRODUCTIVITY.  
THE SELLING & BUYING PROCESS & SERVICE IS YOUR JOB.  
LEAD GENERATING ACTION TO BUILD YOUR PIPELINE IS YOUR BUSINESS...  
KNOW HOW YOU WANT TO BUILD IT & BE CONSISTENT.  
ACTIVITY BREEDS ACTIVITY!

### **LEARN**

BE IN A CONSTANT STATE OF LEARNING ABOUT YOURSELF,  
YOUR BUSINESS, AND YOUR RELATIONSHIPS.

### **SYSTEMS**

A WELL-OILED MACHINE IS BUILT ON A STRONG FOUNDATION  
OF SYSTEMS AND TRACKING. KNOW WHAT YOU'VE DONE AND HOW SO YOU  
KNOW WHAT YOU NEED TO DO TO ACHIEVE YOUR GOALS.

---

NEW YEAR, SAME PASSION PROJECT, 3RD VERSION OF THE G.O.A.L.S. PLANNER.

OUR COMMUNITY HAS SHOWN ME THAT KNOWING WHAT NEEDS TO BE DONE IS  
NOT THE HARD PART WHEN YOU WANT IT BAD ENOUGH & YOUR VISION IS CLEAR.

THE HARD PART IS THE DAILY DRIFT, DISTRACTIONS, HABITS, & EMOTIONS.

**WHAT MAKES IT EASIER IS A LIKE-MINDED GROUP OF FRIENDS THAT  
SHOW UP NO MATTER WHAT TO KEEP YOU ON TRACK.**

WE KNOW WHAT MATTERS TO US AND EACH WEEK  
WE REMIND EACH OTHER,  
ENCOURAGE EACH OTHER,  
AND SUPPORT EACH OTHER.

THANK YOU FOR SHOWING UP FOR YOURSELF, THE GROUP, AND ME.

*Gina Carter*

# 2022 at a glance

---

## JANUARY

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

## FEBRUARY

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

## MARCH

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

## APRIL

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

## MAY

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

## JUNE

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

## JULY

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

## AUGUST

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

## SEPTEMBER

S	M	T	W	T	F	S	
					1	2	3
4	5	6	7	8	9	10	
11	12	13	14	15	16	17	
18	19	20	21	22	23	24	
25	26	27	28	29	30		

## OCTOBER

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

## NOVEMBER

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

## DECEMBER

S	M	T	W	T	F	S	
					1	2	3
4	5	6	7	8	9	10	
11	12	13	14	15	16	17	
18	19	20	21	22	23	24	
25	26	27	28	29	30	31	

---

*a plan to stay*  
**TOP OF MIND**

**POP-BYS + MAIL-BYS  
REVERSE POP-BY EVENT  
REASONS TO REACH OUT  
CLIENT/COMMUNITY EVENT  
SOCIAL MEDIA ENGAGEMENT**

January	February	March
	<b>PREP YOUR SPRING POP-BYS</b>	
April	May	June
	<b>PREP YOUR SUMMER POP-BYS</b>	
July	August	September
	<b>PREP YOUR FALL POP-BYS</b>	
October	November	December
	<b>PREP YOUR HOLIDAY POP-BYS</b>	

# 2022 Q1

## JANUARY

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

## FEBRUARY

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

## MARCH

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

## GOALS THIS QUARTER

I WILL ACCOMPLISH

Business:

Finances:

Family:

Self:

## 10 DAY GOALS

## DREAM BIG 2022 GOALS

# Q1

JANUARY

*Most Proud:*

FEBRUARY

*Most Proud:*

MARCH

*Most Proud:*

KEEP:

---

IMPROVE:

---

START:

---

STOP:

---

# YTD CHECK-IN

## ANNUAL INCOME GOAL

Net Income: \_\_\_\_\_

Gross Income: \_\_\_\_\_

## ANNUAL SALES GOAL

Sales Volume: \_\_\_\_\_

Avg. Sales Price: \_\_\_\_\_

## TRANSACTION GOAL

Annual: \_\_\_\_\_

Monthly: \_\_\_\_\_

## REFERRAL GOAL

Annual: \_\_\_\_\_

Monthly: \_\_\_\_\_

## LIST/BUY APPT GOAL

Annual: \_\_\_\_\_

Monthly: \_\_\_\_\_

## TOTAL CONTACT GOAL

Monthly: \_\_\_\_\_

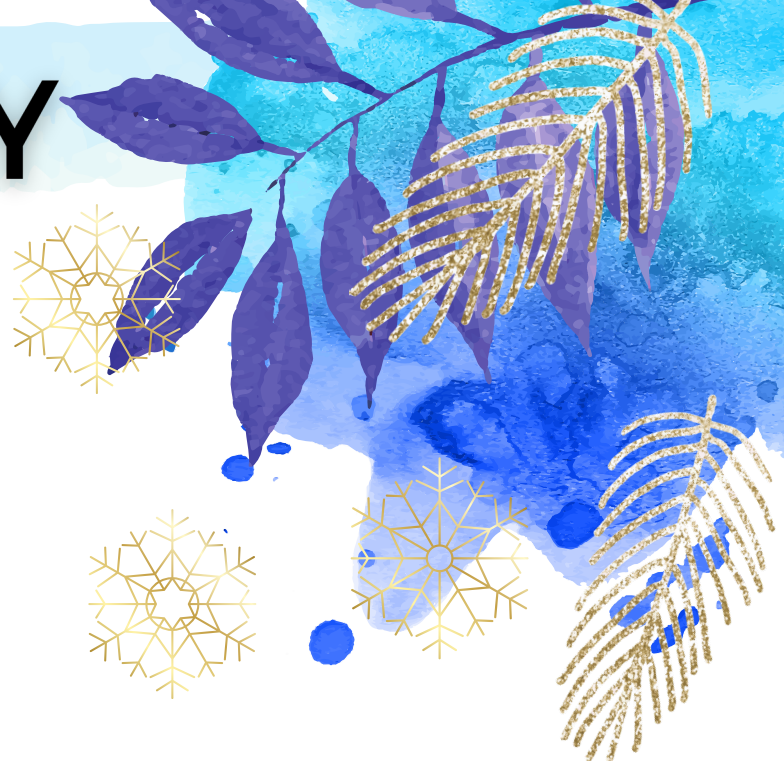
Daily: \_\_\_\_\_

(5 Day Work Week)

**THIS IS THE BUSINESS PLAN I  
DESIGNED TO ACCOMPLISH  
MY GOALS IN 2022**

# JANUARY

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					



TOP 5 GOALS:

FOCUS (YOUR "ONE THING"):

---



---



---



---



---



---

INSPIRATION:

EVENTS/BIRTHDAYS:

1st Happy New Year!

DAILY HABITS TO TRACK:

_____	1	2	3	4	5	6	7	8	9	10	15	20	25	30
	○	○	○	○	○	○	○	○	○	○	○	○	○	○
_____	1	2	3	4	5	6	7	8	9	10	15	20	25	30
	○	○	○	○	○	○	○	○	○	○	○	○	○	○

# a plan to stay TOP OF MIND

POP-BYS + MAIL-BYS  
REASONS TO REACH OUT  
CLIENT/COMMUNITY EVENT  
SOCIAL MEDIA ENGAGEMENT



## MONTHLY MARKETING

- Newsletter Mailer:
- E-Mail:
- Open House:
- Open House:
- Networking:
- Event:

## MONTHLY ACTION PLAN

TRANSACTION GOAL:

ACTUAL:

REFERRAL GOAL:

ACTUAL:

LIST/BUY APPT GOAL:

ACTUAL:

"CONTACTS" GOAL:

ACTUAL:

ADD UP TOTAL  
"CONTACTS" BELOW

CONVERSATIONS:

NOTES:

POP-BYS:

FACE-TO-FACE APPTS:

NEW MET ADDED TO  
DATABASE:

## SPHERE ENGAGEMENT

### Share

*professionally*

- share testimonial received
- share/highlight small business or vendor
- share new listings/listing needs
- share active buyer needs
- share a real estate buyer tip or struggle & solution
- share a real estate seller tip or struggle & solution
- share a step in the real estate process
- share your market update
- share your referral goal
- share your buying/listing appointment goal
- share a business win
- share business behind the scenes
- share your business story (how, why, who)

*personally*

- share a book or podcast
- share a recommendation (product/vendor/place/business)
- share a personal goal
- share a personal win
- share a personal behind the scenes
- share a holiday

### Give

- reward a review given
- reward referral given
- give a review
- giveaway raffle/contest

### Video

- birthdays
- market update
- client transaction update
- virtual home tour
- top referral /A+ client check-in

### Call to Action

- ask for client reviews
- ask for a referral (get specific on what that looks like)
- ask for a recommendation (product/vendor/place/business)





# January

SUN

MON

TUE

S M T W T F S

1  
2 3 4 5 6 7 8  
9 10 11 12 13 14 15  
16 17 18 19 20 21 22  
23 24 25 26 27 28 29  
30 31

2

3

4

## TO-DO LIST

9

10

11

16

17 Martin Luther King

18

23

24

25

## NOTES

30

31

1

WED

THU

FRI

SAT

1 New Year's Day

5

6

7

8

12

13

14

15

19

20

21

22

26

27

28

29

2

3

4

5

# NOTES

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

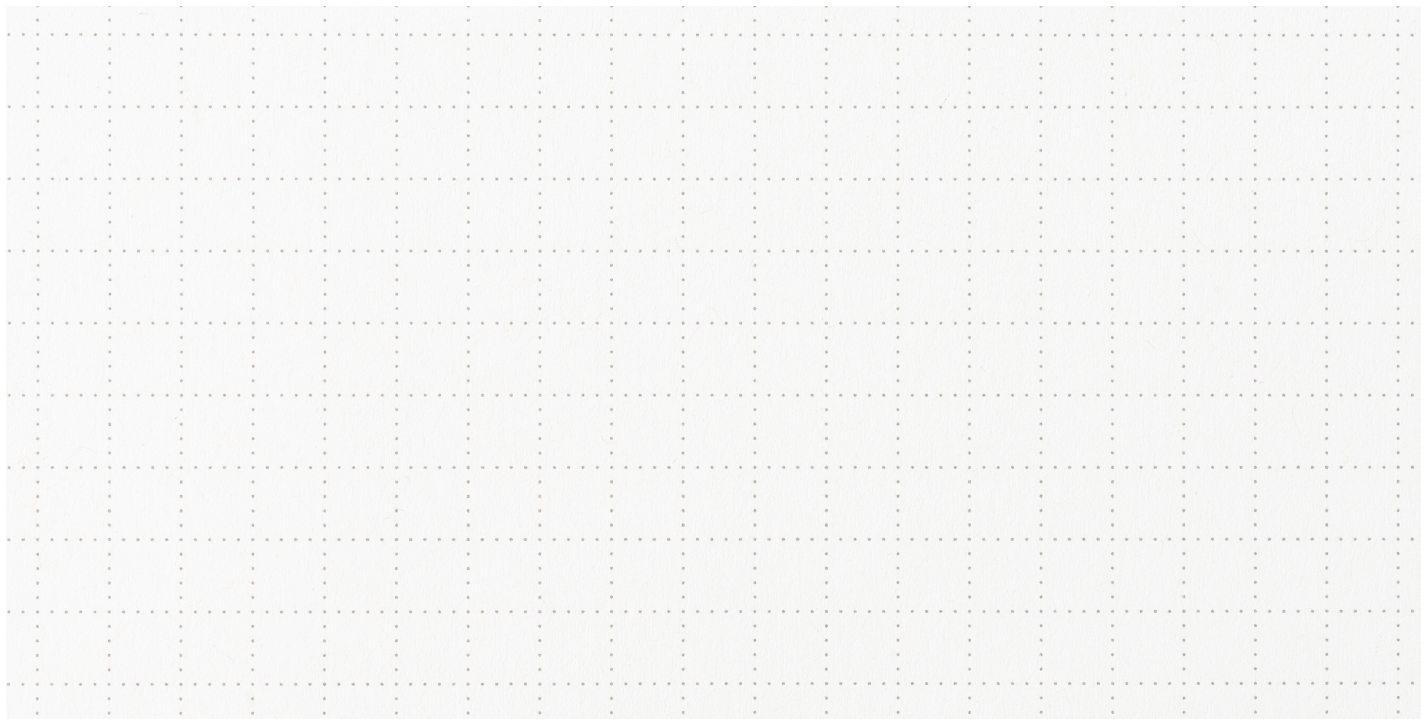
---

---

---

---

---



A grid of dotted lines forming a graph area, suitable for drawing or taking mathematical notes.

# CALLS

*intentional conversations*

MONTH:

**JANUARY**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

8. \_\_\_\_\_

9. \_\_\_\_\_

10. \_\_\_\_\_

11. \_\_\_\_\_

12. \_\_\_\_\_

13. \_\_\_\_\_

14. \_\_\_\_\_

15. \_\_\_\_\_

16. \_\_\_\_\_

17. \_\_\_\_\_

18. \_\_\_\_\_

19. \_\_\_\_\_

20. \_\_\_\_\_

21. \_\_\_\_\_

22. \_\_\_\_\_

23. \_\_\_\_\_

24. \_\_\_\_\_

25. \_\_\_\_\_

26. \_\_\_\_\_

27. \_\_\_\_\_

28. \_\_\_\_\_

29. \_\_\_\_\_

30. \_\_\_\_\_

31. \_\_\_\_\_

32. \_\_\_\_\_

33. \_\_\_\_\_

34. \_\_\_\_\_

35. \_\_\_\_\_

36. \_\_\_\_\_

37. \_\_\_\_\_

38. \_\_\_\_\_

39. \_\_\_\_\_

40. \_\_\_\_\_

41. \_\_\_\_\_

42. \_\_\_\_\_

43. \_\_\_\_\_

44. \_\_\_\_\_

45. \_\_\_\_\_

46. \_\_\_\_\_

47. \_\_\_\_\_

48. \_\_\_\_\_

49. \_\_\_\_\_

50. \_\_\_\_\_

# CONNECT.NURTURE.BUILD.

51. \_\_\_\_\_

52. \_\_\_\_\_

53. \_\_\_\_\_

54. \_\_\_\_\_

55. \_\_\_\_\_

56. \_\_\_\_\_

57. \_\_\_\_\_

58. \_\_\_\_\_

59. \_\_\_\_\_

60. \_\_\_\_\_

61. \_\_\_\_\_

62. \_\_\_\_\_

63. \_\_\_\_\_

64. \_\_\_\_\_

65. \_\_\_\_\_

66. \_\_\_\_\_

67. \_\_\_\_\_

68. \_\_\_\_\_

69. \_\_\_\_\_

70. \_\_\_\_\_

71. \_\_\_\_\_

72. \_\_\_\_\_

73. \_\_\_\_\_

74. \_\_\_\_\_

75. \_\_\_\_\_

76. \_\_\_\_\_

77. \_\_\_\_\_

78. \_\_\_\_\_

79. \_\_\_\_\_

80. \_\_\_\_\_

81. \_\_\_\_\_

82. \_\_\_\_\_

83. \_\_\_\_\_

84. \_\_\_\_\_

85. \_\_\_\_\_

86. \_\_\_\_\_

87. \_\_\_\_\_

88. \_\_\_\_\_

89. \_\_\_\_\_

90. \_\_\_\_\_

91. \_\_\_\_\_

92. \_\_\_\_\_

93. \_\_\_\_\_

94. \_\_\_\_\_

95. \_\_\_\_\_

96. \_\_\_\_\_

97. \_\_\_\_\_

98. \_\_\_\_\_

99. \_\_\_\_\_

100. \_\_\_\_\_

# POP-BYS

MONTH:  
**JANUARY**

*unexpected item of value*

Item: \_\_\_\_\_

Purchased:

Prepped:

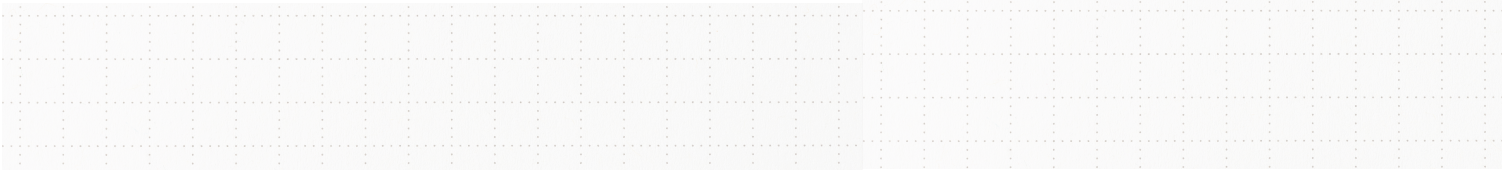
Delivered:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

# NOTES *thoughtful touches*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_
16. \_\_\_\_\_
17. \_\_\_\_\_
18. \_\_\_\_\_
19. \_\_\_\_\_
20. \_\_\_\_\_

21. \_\_\_\_\_
22. \_\_\_\_\_
23. \_\_\_\_\_
24. \_\_\_\_\_
25. \_\_\_\_\_
26. \_\_\_\_\_
27. \_\_\_\_\_
28. \_\_\_\_\_
29. \_\_\_\_\_
30. \_\_\_\_\_
31. \_\_\_\_\_
32. \_\_\_\_\_
33. \_\_\_\_\_
34. \_\_\_\_\_
35. \_\_\_\_\_
36. \_\_\_\_\_
37. \_\_\_\_\_
38. \_\_\_\_\_
39. \_\_\_\_\_
40. \_\_\_\_\_



# WORK-BY-REFERRAL

## Referrals Given This Month

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## Referrals Received This Month

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## Add to Database This Month

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## APPOINTMENTS

### Face-to-Face for Fun

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### Listing & Buying Appointments

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### Closing Days!

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_





# a plan to stay TOP OF MIND

POP-BYS + MAIL-BYS  
REASONS TO REACH OUT  
CLIENT/COMMUNITY EVENT  
SOCIAL MEDIA ENGAGEMENT



## MONTHLY MARKETING

- Newsletter Mailer:
- E-Mail:
- Open House:
- Open House:
- Networking:
- Event:

## MONTHLY ACTION PLAN

TRANSACTION GOAL:

ACTUAL:

REFERRAL GOAL:

ACTUAL:

LIST/BUY APPT GOAL:

ACTUAL:

"CONTACTS" GOAL:

ACTUAL:

ADD UP TOTAL  
"CONTACTS" BELOW

CONVERSATIONS:

NOTES:

POP-BYS:

FACE-TO-FACE APPTS:

NEW MET ADDED TO  
DATABASE:

## SPHERE ENGAGEMENT

### Share

*professionally*

- share testimonial received
- share/highlight small business or vendor
- share new listings/listing needs
- share active buyer needs
- share a real estate buyer tip or struggle & solution
- share a real estate seller tip or struggle & solution
- share a step in the real estate process
- share your market update
- share your referral goal
- share your buying/listing appointment goal
- share a business win
- share business behind the scenes
- share your business story (how, why, who)

*personally*

- share a book or podcast
- share a recommendation (product/vendor/place/business)
- share a personal goal
- share a personal win
- share a personal behind the scenes
- share a holiday

### Give

- reward a review given
- reward referral given
- give a review
- giveaway raffle/contest

### Video

- birthdays
- market update
- client transaction update
- virtual home tour
- top referral /A+ client check-in

### Call to Action

- ask for client reviews
- ask for a referral (get specific on what that looks like)
- ask for a recommendation (product/vendor/place/business)



# February

## OVERVIEW

S M T W T F S

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28

SUN

MON

TUE

1

6

7

8

## TO-DO LIST

13

14 Valentine's Day

15

20

21 Presidents' Day

22

27

28

1

## NOTES


6

7

8

WED

THU

FRI

SAT

---

2

3

4

5

---

9

10

11

12

---

16

17

18

19

---

23

24

25

26

---

2

3

4

5

---

9

10

11

12

---

# NOTES

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

A grid of small squares for writing notes, consisting of 20 columns and 15 rows of small squares.

# CALLS

*intentional conversations*

MONTH:

**FEBRUARY**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

8. \_\_\_\_\_

9. \_\_\_\_\_

10. \_\_\_\_\_

11. \_\_\_\_\_

12. \_\_\_\_\_

13. \_\_\_\_\_

14. \_\_\_\_\_

15. \_\_\_\_\_

16. \_\_\_\_\_

17. \_\_\_\_\_

18. \_\_\_\_\_

19. \_\_\_\_\_

20. \_\_\_\_\_

21. \_\_\_\_\_

22. \_\_\_\_\_

23. \_\_\_\_\_

24. \_\_\_\_\_

25. \_\_\_\_\_

26. \_\_\_\_\_

27. \_\_\_\_\_

28. \_\_\_\_\_

29. \_\_\_\_\_

30. \_\_\_\_\_

31. \_\_\_\_\_

32. \_\_\_\_\_

33. \_\_\_\_\_

34. \_\_\_\_\_

35. \_\_\_\_\_

36. \_\_\_\_\_

37. \_\_\_\_\_

38. \_\_\_\_\_

39. \_\_\_\_\_

40. \_\_\_\_\_

41. \_\_\_\_\_

42. \_\_\_\_\_

43. \_\_\_\_\_

44. \_\_\_\_\_

45. \_\_\_\_\_

46. \_\_\_\_\_

47. \_\_\_\_\_

48. \_\_\_\_\_

49. \_\_\_\_\_

50. \_\_\_\_\_

# CONNECT.NURTURE.BUILD.

51. \_\_\_\_\_

52. \_\_\_\_\_

53. \_\_\_\_\_

54. \_\_\_\_\_

55. \_\_\_\_\_

56. \_\_\_\_\_

57. \_\_\_\_\_

58. \_\_\_\_\_

59. \_\_\_\_\_

60. \_\_\_\_\_

61. \_\_\_\_\_

62. \_\_\_\_\_

63. \_\_\_\_\_

64. \_\_\_\_\_

65. \_\_\_\_\_

66. \_\_\_\_\_

67. \_\_\_\_\_

68. \_\_\_\_\_

69. \_\_\_\_\_

70. \_\_\_\_\_

71. \_\_\_\_\_

72. \_\_\_\_\_

73. \_\_\_\_\_

74. \_\_\_\_\_

75. \_\_\_\_\_

76. \_\_\_\_\_

77. \_\_\_\_\_

78. \_\_\_\_\_

79. \_\_\_\_\_

80. \_\_\_\_\_

81. \_\_\_\_\_

82. \_\_\_\_\_

83. \_\_\_\_\_

84. \_\_\_\_\_

85. \_\_\_\_\_

86. \_\_\_\_\_

87. \_\_\_\_\_

88. \_\_\_\_\_

89. \_\_\_\_\_

90. \_\_\_\_\_

91. \_\_\_\_\_

92. \_\_\_\_\_

93. \_\_\_\_\_

94. \_\_\_\_\_

95. \_\_\_\_\_

96. \_\_\_\_\_

97. \_\_\_\_\_

98. \_\_\_\_\_

99. \_\_\_\_\_

100. \_\_\_\_\_



# POP-BYS

MONTH:  
**FEBRUARY**

*unexpected item of value*

Item: \_\_\_\_\_

Purchased:

Prepped:

Delivered:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

# NOTES *thoughtful touches*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_
16. \_\_\_\_\_
17. \_\_\_\_\_
18. \_\_\_\_\_
19. \_\_\_\_\_
20. \_\_\_\_\_

21. \_\_\_\_\_
22. \_\_\_\_\_
23. \_\_\_\_\_
24. \_\_\_\_\_
25. \_\_\_\_\_
26. \_\_\_\_\_
27. \_\_\_\_\_
28. \_\_\_\_\_
29. \_\_\_\_\_
30. \_\_\_\_\_
31. \_\_\_\_\_
32. \_\_\_\_\_
33. \_\_\_\_\_
34. \_\_\_\_\_
35. \_\_\_\_\_
36. \_\_\_\_\_
37. \_\_\_\_\_
38. \_\_\_\_\_
39. \_\_\_\_\_
40. \_\_\_\_\_



# WORK-BY-REFERRAL

## Referrals Given This Month

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## Referrals Received This Month

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## Add to Database This Month

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## APPOINTMENTS

### Face-to-Face for Fun

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### Listing & Buying Appointments

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### Closing Days!

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# MARCH



S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

## TOP 5 GOALS:

## FOCUS (YOUR "ONE THING"):

---



---



---



---



---



---

## INSPIRATION:



## EVENTS/BIRTHDAYS:

- 13th Selection Sunday March Madness
- 14th Pi Day
- 17th St. Patrick's Day
- 20th First Day of Spring
- 31st Opening Day Baseball

## DAILY HABITS TO TRACK:

_____	1	2	3	4	5	6	7	8	9	10	15	20	25	30
	○	○	○	○	○	○	○	○	○	○	○	○	○	○
_____	1	2	3	4	5	6	7	8	9	10	15	20	25	30
	○	○	○	○	○	○	○	○	○	○	○	○	○	○

# a plan to stay TOP OF MIND

POP-BYS + MAIL-BYS  
REASONS TO REACH OUT  
CLIENT/COMMUNITY EVENT  
SOCIAL MEDIA ENGAGEMENT



## MONTHLY MARKETING

- Newsletter Mailer:
- E-Mail:
- Open House:
- Open House:
- Networking:
- Event:

## MONTHLY ACTION PLAN

TRANSACTION GOAL:

ACTUAL:

REFERRAL GOAL:

ACTUAL:

LIST/BUY APPT GOAL:

ACTUAL:

"CONTACTS" GOAL:

ACTUAL:

ADD UP TOTAL  
"CONTACTS" BELOW

CONVERSATIONS:

NOTES:

POP-BYS:

FACE-TO-FACE APPTS:

NEW MET ADDED TO  
DATABASE:

## SPHERE ENGAGEMENT

### Share

*professionally*

- share testimonial received
- share/highlight small business or vendor
- share new listings/listing needs
- share active buyer needs
- share a real estate buyer tip or struggle & solution
- share a real estate seller tip or struggle & solution
- share a step in the real estate process
- share your market update
- share your referral goal
- share your buying/listing appointment goal
- share a business win
- share business behind the scenes
- share your business story (how, why, who)

*personally*

- share a book or podcast
- share a recommendation (product/vendor/place/business)
- share a personal goal
- share a personal win
- share a personal behind the scenes
- share a holiday

### Give

- reward a review given
- reward referral given
- give a review
- giveaway raffle/contest

### Video

- birthdays
- market update
- client transaction update
- virtual home tour
- top referral /A+ client check-in

### Call to Action

- ask for client reviews
- ask for a referral (get specific on what that looks like)
- ask for a recommendation (product/vendor/place/business)



# March

SUN

MON

TUE

S M T W T F S

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 31

1

6

7

8

## TO-DO LIST

13 Daylight Saving

14

15

20

21

22

27

28

29

## NOTES


3

4

5

WED

THU

FRI

SAT

---

2

3

4

5

---

9

10

11

12

---

16

17 St. Patrick's Day

18

19

---

23

24

25

26

---

30

31

1

2

---

6

7

8

9

---

# NOTES

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---





# CALLS

*intentional conversations*

MONTH:

MARCH

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

8. \_\_\_\_\_

9. \_\_\_\_\_

10. \_\_\_\_\_

11. \_\_\_\_\_

12. \_\_\_\_\_

13. \_\_\_\_\_

14. \_\_\_\_\_

15. \_\_\_\_\_

16. \_\_\_\_\_

17. \_\_\_\_\_

18. \_\_\_\_\_

19. \_\_\_\_\_

20. \_\_\_\_\_

21. \_\_\_\_\_

22. \_\_\_\_\_

23. \_\_\_\_\_

24. \_\_\_\_\_

25. \_\_\_\_\_

26. \_\_\_\_\_

27. \_\_\_\_\_

28. \_\_\_\_\_

29. \_\_\_\_\_

30. \_\_\_\_\_

31. \_\_\_\_\_

32. \_\_\_\_\_

33. \_\_\_\_\_

34. \_\_\_\_\_

35. \_\_\_\_\_

36. \_\_\_\_\_

37. \_\_\_\_\_

38. \_\_\_\_\_

39. \_\_\_\_\_

40. \_\_\_\_\_

41. \_\_\_\_\_

42. \_\_\_\_\_

43. \_\_\_\_\_

44. \_\_\_\_\_

45. \_\_\_\_\_

46. \_\_\_\_\_

47. \_\_\_\_\_

48. \_\_\_\_\_

49. \_\_\_\_\_

50. \_\_\_\_\_

# CONNECT.NURTURE.BUILD.

51. \_\_\_\_\_

52. \_\_\_\_\_

53. \_\_\_\_\_

54. \_\_\_\_\_

55. \_\_\_\_\_

56. \_\_\_\_\_

57. \_\_\_\_\_

58. \_\_\_\_\_

59. \_\_\_\_\_

60. \_\_\_\_\_

61. \_\_\_\_\_

62. \_\_\_\_\_

63. \_\_\_\_\_

64. \_\_\_\_\_

65. \_\_\_\_\_

66. \_\_\_\_\_

67. \_\_\_\_\_

68. \_\_\_\_\_

69. \_\_\_\_\_

70. \_\_\_\_\_

71. \_\_\_\_\_

72. \_\_\_\_\_

73. \_\_\_\_\_

74. \_\_\_\_\_

75. \_\_\_\_\_

76. \_\_\_\_\_

77. \_\_\_\_\_

78. \_\_\_\_\_

79. \_\_\_\_\_

80. \_\_\_\_\_

81. \_\_\_\_\_

82. \_\_\_\_\_

83. \_\_\_\_\_

84. \_\_\_\_\_

85. \_\_\_\_\_

86. \_\_\_\_\_

87. \_\_\_\_\_

88. \_\_\_\_\_

89. \_\_\_\_\_

90. \_\_\_\_\_

91. \_\_\_\_\_

92. \_\_\_\_\_

93. \_\_\_\_\_

94. \_\_\_\_\_

95. \_\_\_\_\_

96. \_\_\_\_\_

97. \_\_\_\_\_

98. \_\_\_\_\_

99. \_\_\_\_\_

100. \_\_\_\_\_

# POP-BYS

MONTH:

MARCH

*unexpected item of value*

Item: \_\_\_\_\_

Purchased:

Prepped:

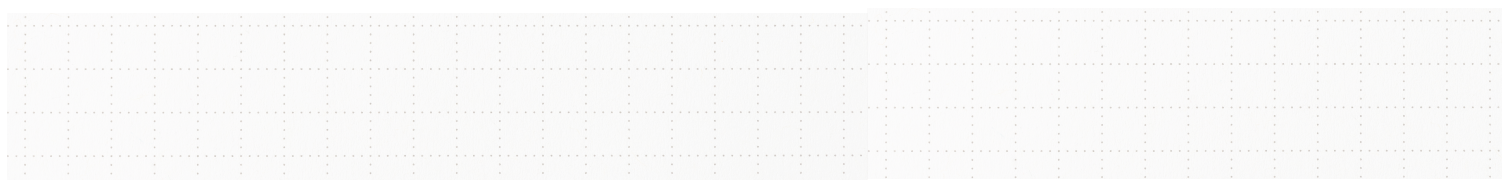
Delivered:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

# NOTES *thoughtful touches*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_
16. \_\_\_\_\_
17. \_\_\_\_\_
18. \_\_\_\_\_
19. \_\_\_\_\_
20. \_\_\_\_\_

21. \_\_\_\_\_
22. \_\_\_\_\_
23. \_\_\_\_\_
24. \_\_\_\_\_
25. \_\_\_\_\_
26. \_\_\_\_\_
27. \_\_\_\_\_
28. \_\_\_\_\_
29. \_\_\_\_\_
30. \_\_\_\_\_
31. \_\_\_\_\_
32. \_\_\_\_\_
33. \_\_\_\_\_
34. \_\_\_\_\_
35. \_\_\_\_\_
36. \_\_\_\_\_
37. \_\_\_\_\_
38. \_\_\_\_\_
39. \_\_\_\_\_
40. \_\_\_\_\_



# WORK-BY-REFERRAL

## Referrals Given This Month

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## Referrals Received This Month

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## Add to Database This Month

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## APPOINTMENTS

### Face-to-Face for Fun

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### Listing & Buying Appointments

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### Closing Days!

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_