20.A.L.S.
22.23

Manuer



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 GENEATING ACTION TO BUILD YOUR PIPELINE IS YOUR BUSINESS...

KNOW HOW YOU WANT TO BUILD IT & BE CONSISTENT.

ACTIVIY 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.

E. Giha Carter

2022 at a glance

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3 10 17 24	4 11 18	T 5 12 19	W 6 13 20	T 7 14 21	1 8 15 22	2 9 16 23	7 14 21	M 1 8 15 22	T 2 9 16 23	W 3 10 17 24	T 4 11 18	F 5 12 19	6 13 20	4 11 18	M 5 12 19	T 6 13 20	W 7 14 21	T 1 8 15 22	F 2 9 16 23	3 10 17
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3 10 17 24 31	4 11 18 25	5 12 19 26	W6132027	7 14 21 28	1 8 15 22 29	2 9 16 23 30	7 14 21 28	M 1 8 15 22 29	T 2 9 16 23 30	W 3 10 17 24 31	T 4 11 18 25	F 5 12 19 26	6 13 20 27	4 11 18 25	5 12 19 26	6 13 20 27	7 14 21 28	T 1 8 15 22 29	F 2 9 16 23 30	3 10 17 24
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POP-BYS + MAIL-BYS
REVERSE POP-BY EVENT
REASONS TO REACH OUT
CLIENT/COMMUNITY EVENT
SOCIAL MEDIA ENGAGEMENT

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



JANUARY

S	M	T	W	T	F	S
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2	3	4	5	6	7	8
9	10	11	12	13	14	15
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30	31					

FEBRUARY

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20	21	22	23	24	25	26
27	20					

MARCH

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6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
2.7	28	29	30	31		

GOALS THIS QUARTER I WILL ACCOMPLISH

Business:

Finances:

Family:

Self:

10 DAY GOALS

DREAM BIG 2022 GOALS



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:	

TRANSACTION GOAL

Avg. Sales Price:

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



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 PLA	.
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



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/lisitng appointment goal
- share a business win
- share business behind the scenes
- share your business story (how, why, who



- 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)

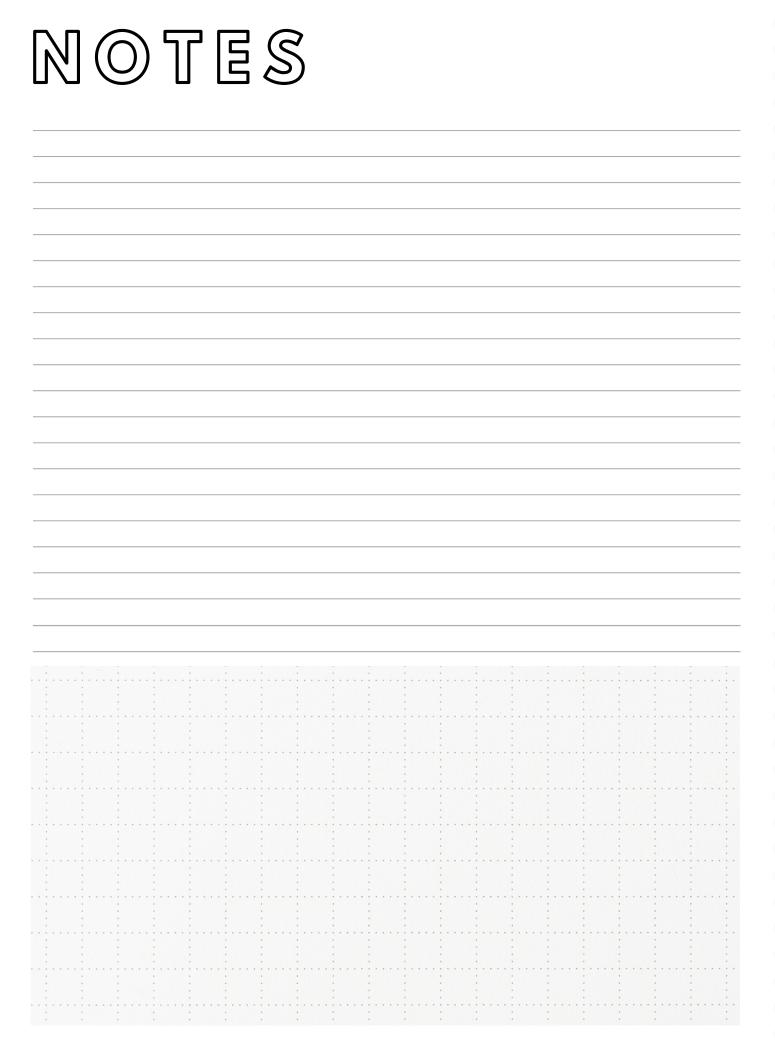


MONTH: JANUARY

Farnasy

	SUN	MON	TUE
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TO-DO LIST			
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0	46	47 Martin Labor King	
0	16	17 Martin Luther King	18
0			
O			
<u> </u>	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



CALLS intentional conversation

1.

MONTH: JANUARY

intentional	conversations
intentional	conversations

2 .	
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50.

CONNECT.NURTURE.BUILD.

<u>51.</u>	<u>76.</u>
52 .	77 .
53.	78 .
54.	79.
55.	80.
56.	81.
57 .	82.
58.	83.
59.	84.
60.	85.
61.	86.
62 .	87.
63.	88.
64.	89.
65.	90.
66.	91.
67 .	92.
68.	93.
69.	94.
70.	95.
71 .	96.
72 .	97.
73 .	98.
74.	99.
75 .	100.

POP-BYS

MONTH: JANUARY

wexpecte	rd item	of valu	e

Item:	2.
Purchased:	3.
Purchased: Prepped: Delivered:	4.
	5.
	6.
	7.
	8.
	9.
	10.

NOTES thoughtful touches

1.	21 .
2.	22.
3.	23.
4.	24.
5.	25.
6.	26.
7.	27.
B.	28.
9.	29 .
10.	30.
11.	31.
12.	32.
13.	33.
14.	34.
15.	35.
16.	36.
17.	37.
18.	38.
19.	39.
20.	40.

WORK-BY-REFERRAL

Referrals Given This Month	APPOINTMENTS
1.	
2.	Face-to-Face for Fun
3.	1.
4.	2 .
5.	
6.	
7 .	4.
8.	<u>5.</u>
9.	6.
10.	
Referrals Received This Month	
1.	
2.	Listing & Buying Appointments
3.	<u> </u>
4.	2 .
5.	 3 .
6.	4 .
7 .	
8.	<u>5.</u>
9.	<u>6.</u>
10.	<u>7.</u>
Add to Database This Month	8.
1.	
2.	
3.	
4.	Closing Days!
5.	1.
6.	2 .
7.	
8.	<u>3.</u>
9.	

10.

FEBRUARY

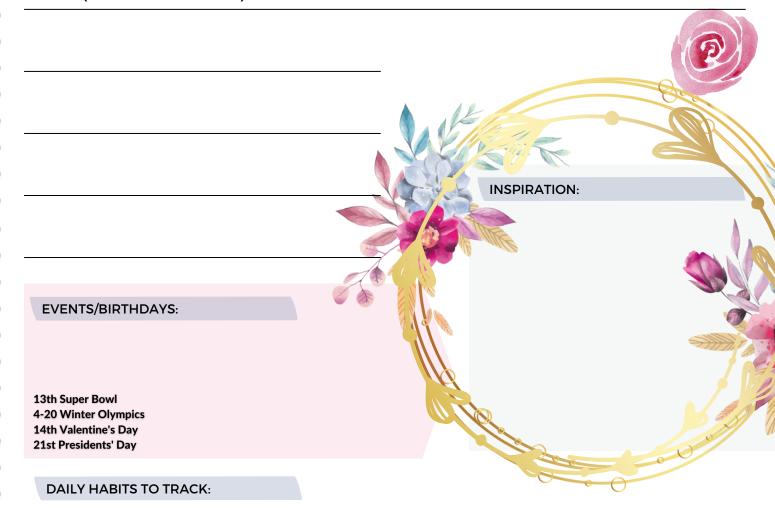
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6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26

TOP 5 GOALS:

28

27

FOCUS (YOUR "ONE THING"):



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:	
IONTHLY ACTION PLA	h
TRANSACTION GOAL:	
ACTUAL:	
REFERRAL GOAL:	
ACTUAL:	
LICT/DUN/ ADDT COAL	
LIST/BUY APPT GOAL: ACTUAL:	
ACTOAL.	
"CONTACTS" GOAL:	
ACTUAL:	
ADD UP TOTAL "CONTACTS" BELOW	
CONVERSATIONS:	
NOTES:	
POP-BYS:	
FACE-TO-FACE APPTS:	
NEW MET ADDED TO DATABASE:	

SPHERE ENGAGEMENT

Share



- share testimonial received
- share/highlight small business or vendor
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- share your referral goal
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- share a business win
- share business behind the scenes
- share your business story (how, why, who



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

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- 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)

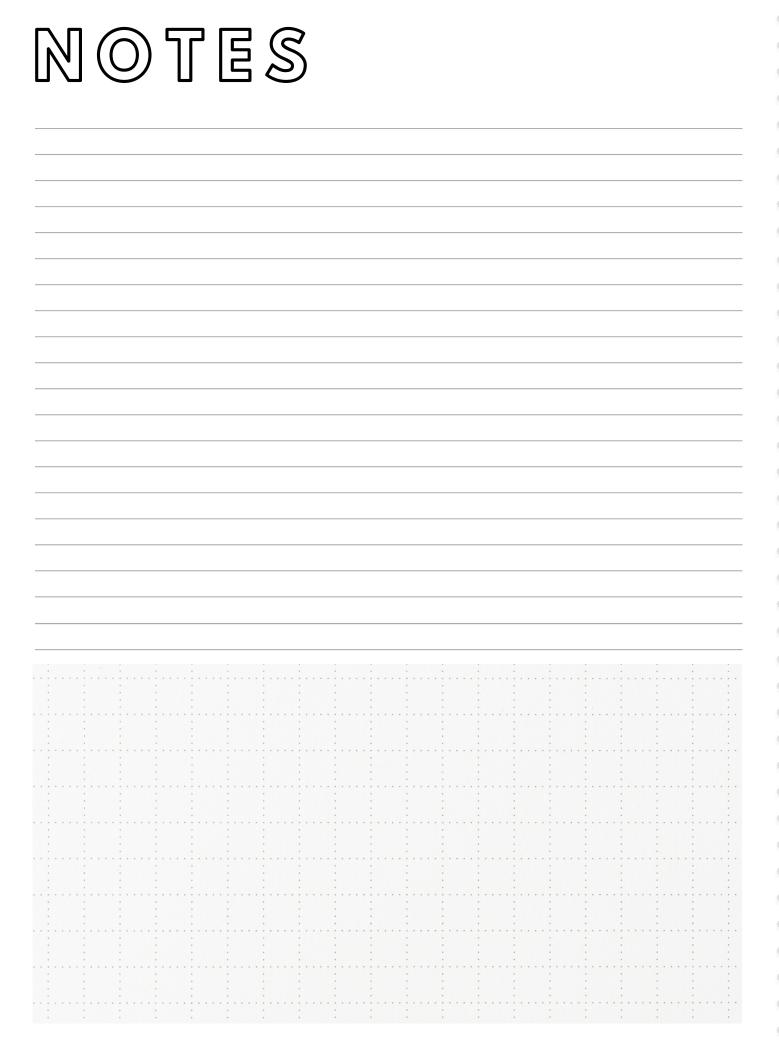


MONTH: FEBRUARY

February

OVERVIEW	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			1
20 21 22 23 24 25 26 27 28	6	7	8
TO-DO LIST			
O O	13	14 Valentine's Day	15
0			
O ————————————————————————————————————	20	21 Presidents' Day	22
0			
0	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



CALLS intentional conversations

MONTH:

FEBRUARY

1.	 26 .
2.	27 .
3.	 28 .
4.	29 .
5.	30.
6.	31.
7.	32 .
8.	33.
9.	34.
10.	35.
11.	36.
12.	37.
13.	38.
14.	39.
15.	40.
16.	41.
17.	42.
18.	43.
19.	44.
20.	45.
21.	46.
22.	47.
23.	48.
24.	49.
25	50.

CONNECT.NURTURE.BUILD.

51.	76 .
52 .	77 .
53.	78 .
54.	79 .
55.	80.
56.	<u>81.</u>
57.	82 .
58.	83.
59.	84.
60.	85.
61.	86.
62 .	87.
63.	88.
64.	89.
65.	90.
66.	91.
67.	92.
68.	93.
69.	94.
70.	95.
71 .	96.
72 .	97.
73.	98.
74.	99.
75 .	100.

POP-BYS

MONTH: FEBRUARY

	wex	pected	item	of	value
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Item:	2 .
Purchased:	3.
Prepped: Delivered:	4.
Delivered:	5.
	6.
	7 .
	8.
	9.
	10.

NOTES thoughtful touches

1.	<u>21.</u>
2.	22.
3.	23.
4.	24.
5.	25.
6.	26.
7.	27.
8.	28.
9.	29.
10.	30.
11.	31.
12.	32.
13.	33.
14.	34.
15.	35.
16.	36.
17.	37.
18.	38.
19.	39.
20.	40.

WORK-BY-REFERRAL

	APPOINTMENTS
Referrals Given This Month	
1.	F 4. F 4 F
2.	Face-to-Face for Fun
3.	<u>1.</u>
4.	2 .
5.	
6.	
7.	<u>4.</u>
8.	<u>5.</u>
9.	6 .
10.	
Referrals Received This Month	
1.	
2.	Listing & Buying Appointments
3.	<u>1.</u>
4.	
5.	3 .
6.	4 .
7.	
8.	<u>5.</u>
9.	6 .
10.	7 .
ALL D. I. TI'NA II	8.
Add to Database This Month 1.	
·· 2 .	
2 . 3.	
	Closing Days!
	
6.	<u>1.</u>
7.	
7 . 8.	3.
9.	

10.

MARCH

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20	21	22	23	24	25	26
27	28	29	30	31		



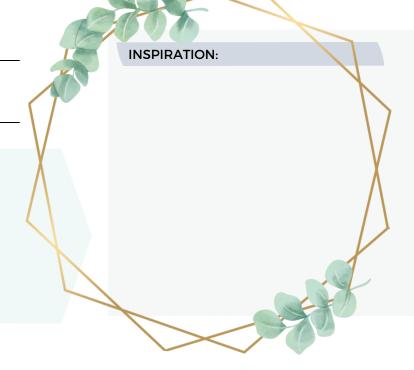
TOP 5 GOALS:

FOCUS (YOUR "ONE THING"):

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:



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 PLA	.
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:	

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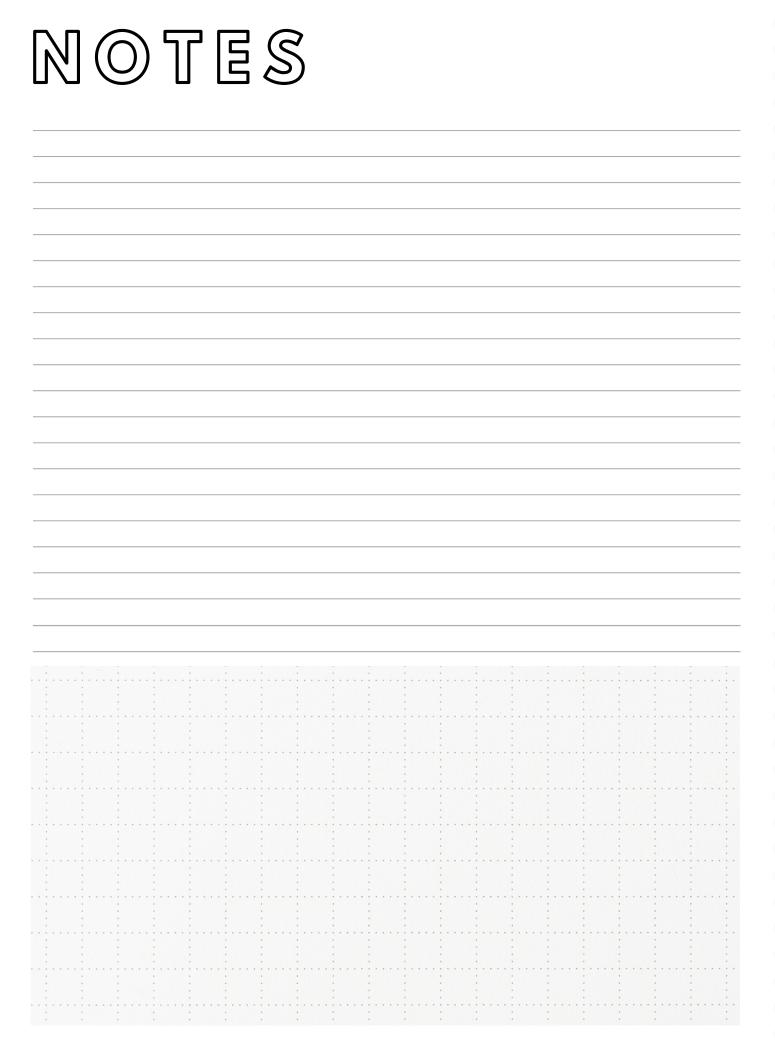


MONTH: MARCH

March

	SUN	MON	TUE
S M T W T F S			1
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	6	7	8
TO-DO LIST			
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O			
O			
<u> </u>	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



CALLS intentional conversations

MONTH:

MARCH

1.	
2.	27 .
3.	28.
4.	29.
5.	30.
6.	31.
7.	32 .
8.	33.
9.	34.
10.	35.
11.	36.
12.	37 .
13.	38.
14.	39 .
15.	40.
16.	41.
17.	42.
18.	43.
19.	44.
20.	45.
21.	46.
22.	47.
23.	48.
24.	49.
25	50

CONNECT.NURTURE.BUILD.

<u>76.</u>
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

	+.	~0		, .
wrexpected	yem	of	ral	ue

Item:	2.
Purchased:	3.
Purchased: Prepped: Delivered:	4.
Delivered:	5.
	6.
	7.
	8.
	9.
	10.

NOTES thoughtful touches

1.	<u>21. </u>
2.	22.
3.	23.
4.	24.
5.	25.
6.	26.
7.	27.
8.	28.
9.	29.
10.	30.
11.	31.
12.	32.
13.	33.
14.	34.
15.	35.
16.	36.
17.	37.
18.	38.
19.	39.
20.	40.

WORK-BY-REFERRAL

Referrals Given This Month	APPOINTMENTS
1.	
2.	Face-to-Face for Fun
3.	1.
4.	2 .
5.	
6.	
7 .	4.
8.	<u>5.</u>
9.	<u>6</u> .
10.	
Referrals Received This Month	
1.	
2.	Listing & Buying Appointments
3.	<u> </u>
4.	2 .
5.	 3 .
6.	4 .
7 .	
8.	<u>5.</u>
9.	<u>6.</u>
10.	<u>7.</u>
Add to Database This Month	8.
1.	
2.	
3.	
4.	Closing Days!
5.	1.
6.	2 .
7.	
8.	<u>3.</u>
9.	

10.