

Getting Started!

Thank you so much for getting the Realtor Planner! My goal is to make your life easier and keep you on track and working effectively. There are many pages in this planner and the intention is not that you will use every one, everyday. Instead you should find a calendar that you like that lets you work effectively, and then pick and choose the forms that will help you get the job done!

I worked on this calendar with the amazing Deborah Ward who is a “planning machine”. She has figured out how to have an amazing real estate team, profitable business and still travel the world. Her input was invaluable to the effectiveness of this planner!

Please do not hesitate to email me if you have any questions... tara@marketingartfully.com

**Walkthrough Video >> The link to the “how to use this planner” video is
www.PaperlyPeople.com/RealtorPlanner**

Forms included:

Calendaring

- **Weekly Calendar Spread** - For the Realtor who likes to be able to see their whole week at a glance, print duplexed to make it a calendar!
- **Daily Appointment Calendar** - This handy calendar page is great if you are established and running like a well oiled machine. With places to put your appointments, must dos and to dos, it helps you stay on track all day!
- **Monthly Perpetual Calendar** - Great for doing your “ahead” planning of trips, kids vacations and critical due dates.
- **3 Month Calendar** - This one is good for when you want to be able to see your quarterly obligations all in one place! Do your goal setting, monthly must dos and plan for admin and work days.

Lead Generation

As we all know, real estate success is all about lead generation. Keeping your pipeline of prospects full is a full time job in and of itself. These forms will help make sure you don't lose a lead ever again!

- **Listings Lead Sheet** - Track your listing leads including connecting and followup
- **Buyers Lead Sheet** - Track your buyer leads including connecting and followup
- **Never Lose A Lead Sheet** - There is nothing worse than that sinking feeling that you just forgot a lead. With this sheet you can make sure to followup in two days, two weeks and two months. The thing about having your leads together like this is that when you have some time (say at an open house) you can open up your planner and start dialing!

Referrals

- **Referral Form** - When I was an agent I did A LOT of referrals and never felt like I had a real handle on who was doing well with the leads I gave them and where they were in the process of the transaction (so I could get paid). This form will allow you to track your leads and figure out who does the best work for you!

Weekly Success Chart

- This one is from the amazing Deborah Ward. She uses this to track her production for the week! Track your daily contacts, your listings and sales. If you are trying to make some big numbers, this is the perfect sheet to use!

Goal Setting

- **Giant Goals List** - Sometimes it is hard to get all our goals out on paper. By sitting down and forcing yourself to write out 50 goals you realize things that you might never discover if you are just doing a basic goals sheet!
- **Running Goals Sheet** - Tracking your GCI, listings and buyers is a great way to make sure your year is on the right track. And even though we can have many goals for the year, it really is hard to focus on more than a few things each month. Use this one to stay on track and monitor the progress of your goals!
- **Monthly Goals Sheet** - There are many pieces of your business and it is good to look at all the dimensions each month so you can plan out your tasks. This one will let you scope out your marketing tasks and themes, social media goals and even upcoming birthdays. Additionally there is a place to record upcoming listings so when someone says give me a call in a couple of months, you can be Johnny On The Spot!

33 Touch

- **33 Touch Sheet** - One of the coolest things about the book, The Millionaire Real Estate Agent, is that top real estate producers have a plan to call, email and direct mail their top connections 33 times a year. Functionally that is about every 11 days. To make things easier, I use a 36 touch schedule so you can do three things a month to connect with your database.

Open Houses

- **Open House Checklist** - I am a huge proponent of open houses and this is a great way to make sure you are prepared and that your efforts are worth while.
- **Open House Signin Form** - You should be collecting names, emails and addresses of everyone who attends your open houses. This sheet will let you gather names of potential prospects.

Covers

- There are three different cover designs to use for your planner!

from _____ / _____ / _____

Monday

8 _____

8³⁰ _____

9 _____

9³⁰ _____

10 _____

10³⁰ _____

11 _____

11³⁰ _____

12 _____

12³⁰ _____

1 _____

1³⁰ _____

2 _____

2³⁰ _____

3 _____

3³⁰ _____

4 _____

4³⁰ _____

5 _____

5³⁰ _____

6 _____

6³⁰ _____

7 _____

7³⁰ _____

8 _____

8³⁰ _____

Tuesday

8 _____

8³⁰ _____

9 _____

9³⁰ _____

10 _____

10³⁰ _____

11 _____

11³⁰ _____

12 _____

12³⁰ _____

1 _____

1³⁰ _____

2 _____

2³⁰ _____

3 _____

3³⁰ _____

4 _____

4³⁰ _____

5 _____

5³⁰ _____

6 _____

6³⁰ _____

7 _____

7³⁰ _____

8 _____

8³⁰ _____

Wednesday

8 _____

8³⁰ _____

9 _____

9³⁰ _____

10 _____

10³⁰ _____

11 _____

11³⁰ _____

12 _____

12³⁰ _____

1 _____

1³⁰ _____

2 _____

2³⁰ _____

3 _____

3³⁰ _____

4 _____

4³⁰ _____

5 _____

5³⁰ _____

6 _____

6³⁰ _____

7 _____

7³⁰ _____

8 _____

8³⁰ _____

Month: _____ Year: _____

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Month: _____ Year: _____

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

Month: _____ Year: _____

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

Month: _____ Year: _____

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

Listing lead Sheet

Name: _____ Date: ____/____/____ Prospect Cust

Contact Info

Address: _____

City: _____ St: _____ Zip: _____

Email: _____ work home newsletter

1st Phone: (____) _____ - _____ 2nd Phone: (____) _____ - _____ call text

Birth date: ____/____/____ Spouse/Sig Other _____

Kids: _____ Pets: _____

Source: _____ Next Contact: ____/____/____ in cal

Reason for Moving: _____ Date Moving: ____/____/____

Social Media

Friendd on Facebook Connected on LinkedIn Followed on Pinterest Subscribed on YouTube

Followed on Instagram Followed on Twitter Other: _____

Followup Contacts:

1. _____ Date: ____/____/____ call email text soc media mail

Notes: _____

2. _____ Date: ____/____/____ call email text soc media mail

Notes: _____

3. _____ Date: ____/____/____ call email text soc media mail

Notes: _____

4. _____ Date: ____/____/____ call email text soc media mail

Notes: _____

5. _____ Date: ____/____/____ call email text soc media mail

Notes: _____

Notes: _____

Buyers lead Sheet

Name: _____ Date: ____/____/____ Prospect Cust

Contact Info

Address: _____

City: _____ St: _____ Zip: _____

Email: _____ work home newsletter

1st Phone: (____) _____ - _____ 2nd Phone: (____) _____ - _____ call text

Birth date: ____/____/____ Spouse/Sig Other _____

Kids: _____ Pets: _____

Source: _____ Next Contact: ____/____/____ in cal

Reason for Moving: _____ Date Moving: ____/____/____

Type Of Home Looking For Has Home To Sell Listed

Bedrooms #_____ Baths #_____ Garage #_____ New Const Move In Pool Gas Fence

School District: _____ Other Amenities: _____

Notes: _____

Preapproved Yes Lender: _____

Phone: (____) _____ - _____ Email: _____

Social Media

Friendd on Facebook Connected on LinkedIn Followed on Pinterest Subscribed on YouTube

Followed on Instagram Followed on Twitter Other: _____

Followup Contacts:

1. _____ Date: ____/____/____ call email text soc media mail

Notes: _____

2. _____ Date: ____/____/____ call email text soc media mail

Notes: _____

3. _____ Date: ____/____/____ call email text soc media mail

Notes: _____

4. _____ Date: ____/____/____ call email text soc media mail

Notes: _____

5. _____ Date: ____/____/____ call email text soc media mail

Notes: _____

Name: _____ Date: ____ / ____ / ____
 Email: _____ Wk Hm
 Phone: (____) _____ - _____ Wk Hm | Source: _____ Seller Buyer
 2 days ____ / ____ / ____ 2 weeks ____ / ____ / ____ 2 months ____ / ____ / ____

Name: _____ Date: ____ / ____ / ____
 Email: _____ Wk Hm
 Phone: (____) _____ - _____ Wk Hm | Source: _____ Seller Buyer
 2 days ____ / ____ / ____ 2 weeks ____ / ____ / ____ 2 months ____ / ____ / ____

Name: _____ Date: ____ / ____ / ____
 Email: _____ Wk Hm
 Phone: (____) _____ - _____ Wk Hm | Source: _____ Seller Buyer
 2 days ____ / ____ / ____ 2 weeks ____ / ____ / ____ 2 months ____ / ____ / ____

Name: _____ Date: ____ / ____ / ____
 Email: _____ Wk Hm
 Phone: (____) _____ - _____ Wk Hm | Source: _____ Seller Buyer
 2 days ____ / ____ / ____ 2 weeks ____ / ____ / ____ 2 months ____ / ____ / ____

Name: _____ Date: ____ / ____ / ____
 Email: _____ Wk Hm
 Phone: (____) _____ - _____ Wk Hm | Source: _____ Seller Buyer
 2 days ____ / ____ / ____ 2 weeks ____ / ____ / ____ 2 months ____ / ____ / ____

Name: _____ Date: ____ / ____ / ____
 Email: _____ Wk Hm
 Phone: (____) _____ - _____ Wk Hm | Source: _____ Seller Buyer
 2 days ____ / ____ / ____ 2 weeks ____ / ____ / ____ 2 months ____ / ____ / ____

Prospect's Name: _____ Source _____

Email: _____ work home newsletter

1st Phone: (_____) _____ - _____ call txt 2nd Phone: (_____) _____ - _____ call txt

Buyer Seller Past Client Price Range of Property \$ _____ Referral % _____

Property Add. / Location Looking: _____

Notes: _____

● ● ●

Referral Agent Name: _____ Completed Paid Comm.

Email: _____ Comm Amount \$ _____

Phone: (_____) _____ - _____ Date Referred: ____ / ____ / ____

Followup

Date: ____ / ____ / ____ Notes: _____

Date: ____ / ____ / ____ Notes: _____

Date: ____ / ____ / ____ Notes: _____

Date: ____ / ____ / ____ Notes: _____

Prospect's Name: _____ Source _____

Email: _____ work home newsletter

1st Phone: (_____) _____ - _____ call txt 2nd Phone: (_____) _____ - _____ call txt

Buyer Seller Past Client Price Range of Property \$ _____ Referral % _____

Property Add. / Location Looking: _____

Notes: _____

● ● ●

Referral Agent Name: _____ Completed Paid Comm.

Email: _____ Comm Amount \$ _____

Phone: (_____) _____ - _____ Date Referred: ____ / ____ / ____

Followup

Date: ____ / ____ / ____ Notes: _____

Date: ____ / ____ / ____ Notes: _____

Date: ____ / ____ / ____ Notes: _____

Date: ____ / ____ / ____ Notes: _____

Giant Goals List

- | | |
|-----------|-----------|
| 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. _____ |

Top 3 Goals!

- | |
|----------|
| 1. _____ |
| 2. _____ |
| 3. _____ |

Running Goals

Goals for the Year

GC1 \$ _____

Listings _____ # Buyers _____

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

January - GC1 \$ _____ # List _____ # Buy _____

February - GC1 \$ _____ # List _____ # Buy _____

March - GC1 \$ _____ # List _____ # Buy _____

April - GC1 \$ _____ # List _____ # Buy _____

May - GC1 \$ _____ # List _____ # Buy _____

June - GC1 \$ _____ # List _____ # Buy _____

July - GC1 \$ _____ # List _____ # Buy _____

August - GC1 \$ _____ # List _____ # Buy _____

September - GC1 \$ _____ # List _____ # Buy _____

October - GC1 \$ _____ # List _____ # Buy _____

November - GC1 \$ _____ # List _____ # Buy _____

December - GC1 \$ _____ # List _____ # Buy _____

Upcoming Listings

Name: _____
 Address: _____

 Phone: (_____) _____ - _____
 ●●●

Name: _____
 Address: _____

 Phone: (_____) _____ - _____
 ●●●

Name: _____
 Address: _____

 Phone: (_____) _____ - _____
 ●●●

Name: _____
 Address: _____

 Phone: (_____) _____ - _____
 ●●●

Name: _____
 Address: _____

 Phone: (_____) _____ - _____
 ●●●

●●●
Birthdays

Name: _____ Day: _____
 Name: _____ Day: _____
 Name: _____ Day: _____
 Name: _____ Day: _____
 Name: _____ Day: _____
 Name: _____ Day: _____
 Name: _____ Day: _____
 Name: _____ Day: _____

Monthly Theme

Notes

Promotion Days / Holidays

1. _____
 2. _____
 3. _____
 4. _____
 5. _____
 6. _____

Social Media / Videos Brainstorming

Top 3 Things To Focus On This Month!

1. _____
 2. _____
 3. _____

Goals

Hours Prospecting: _____
 New Leads: _____
 Listing Appts Set: _____
 Listing Appts: _____
 New Listings: _____
 Listings Cont: _____
 Listings Closed: _____
 Buyers Closed: _____
 # Inventory _____

GCI Goal:

\$ _____

Monthly Marketing Goals

Open Houses _____
 # of Blog Posts _____
 # of Videos Made _____
 # of Social Posts _____
 # of Newsletters _____
 # of Mailings _____
 # of Networking _____

33 Touch Plan

January - Theme -----

Calls # ----- Emails # ----- Mailings # -----

February- Theme -----

Calls # ----- Emails # ----- Mailings # -----

March- Theme -----

Calls # ----- Emails # ----- Mailings # -----

April - Theme -----

Calls # ----- Emails # ----- Mailings # -----

May - Theme -----

Calls # ----- Emails # ----- Mailings # -----

June - Theme -----

Calls # ----- Emails # ----- Mailings # -----

July - Theme -----

Calls # ----- Emails # ----- Mailings # -----

August - Theme -----

Calls # ----- Emails # ----- Mailings # -----

September - Theme -----

Calls # ----- Emails # ----- Mailings # -----

October - Theme -----

Calls # ----- Emails # ----- Mailings # -----

November - Theme -----

Calls # ----- Emails # ----- Mailings # -----

December - Theme -----

Calls # ----- Emails # ----- Mailings # -----

<input type="checkbox"/> Updated key	<input type="checkbox"/> Band-aids
<input type="checkbox"/> Signs (with Time & Address)	<input type="checkbox"/> Dog Treats
<input type="checkbox"/> Loan Advisor	<input type="checkbox"/> Toilet Paper Roll
<input type="checkbox"/> Balloons or Pinwheels	<input type="checkbox"/> Measuring Tape
<input type="checkbox"/> Sign In Sheet	<input type="checkbox"/> Ziplock Bags
<input type="checkbox"/> Counter Sign With Correct Month	<input type="checkbox"/> Tissues
<input type="checkbox"/> Business Cards	<input type="checkbox"/> Pepper Spray
<input type="checkbox"/> Personal Brochures	<input type="checkbox"/> Bug Spray
<input type="checkbox"/> Postcards	<input type="checkbox"/> Sun Screen
<input type="checkbox"/> Agent's Full Report	<input type="checkbox"/> Baby Wipes
<input type="checkbox"/> Tax Records	<input type="checkbox"/> Sting Wipes
<input type="checkbox"/> (10) Buyers Full Reports	<input type="checkbox"/> Umbrella
<input type="checkbox"/> List of Alternates (Buyers Short Report)	
<input type="checkbox"/> CMA For Property Holding Open	
<input type="checkbox"/> Buyers Disclosure	
<input type="checkbox"/> Computer / Magazines	

Day/Date: -----

Time: -----

Owner Phone: -----

Phone: (-----) ----- - -----

Owner Approval

Owner Update Day Before

Update After Open House

Agent Name -----

Agent Phone -----

Phone: (-----) ----- - -----

Agent Approved

Agent Update Day Before

Update After Open House

Results

Attendees -----

Listing Leads # -----

Buyer Leads # -----

Added to Database # -----

Top Prospect: -----

Listing Lead Buyer Lead

Notes: -----

Notes: -----

Name: -----

Email: ----- Phone: (-----) ----- - -----

•••

Name: -----

Email: ----- Phone: (-----) ----- - -----

•••

Name: -----

Email: ----- Phone: (-----) ----- - -----

•••

Name: -----

Email: ----- Phone: (-----) ----- - -----

•••

Name: -----

Email: ----- Phone: (-----) ----- - -----

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Name: -----

Email: ----- Phone: (-----) ----- - -----

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Name: -----

Email: ----- Phone: (-----) ----- - -----

•••

Name: -----

Email: ----- Phone: (-----) ----- - -----

••

Name: -----

Email: ----- Phone: (-----) ----- - ----- •

**The best
preparation for
good work
tomorrow is to do
good work today.**

Elbert Hubbard



**Plans are nothing;
planning is everything.**

Dwight D. Eisenhower



