

Week of: \_\_\_\_\_

**Top 100:** *the 100 most influential clients and prospects that “know you”, “like you” and “trust you” as their real estate broker and resource for “all things” real estate.*

Goal of Additions/Strengtheners: \_\_\_\_\_ Start Count: \_\_\_\_\_

Current Count: \_\_\_\_\_ Additions/Strengtheners Remaining: \_\_\_\_\_

Platinum Clients: \_\_\_\_\_ Gold Clients: \_\_\_\_\_ Silver Clients: \_\_\_\_\_

Current Count of Referral Partners: \_\_\_\_\_ Annual Goal for Referral Partners: \_\_\_\_\_

### This Week’s “Follow Back” (Past Clients) Action Steps:

Hand Written Notes:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____
Phone Calls:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____
Social Media Touches:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____
Reach out via Email/Text:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____

### This Week’s “Follow Up” (Prospects) Action Steps:

Market Review/Send Listings:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____
ADD Value/Neighborhood Info:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____
Evidence of Success:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____

### This Week’s “Personal Branding” Action Steps:

Strategic Gifting:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____
Birthday Cards or Gifts:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____
Anniversary Cards or Gifts:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____
Social Media Posts: <i>“Know You, Like You, Trust You” Posts</i>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____

### This Week’s Referral Partner Actions Steps:

Phone Calls:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____
Email/Texts:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____
Social Media Direct Message:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____
Handwritten Notes:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goal this Week: _____

**TOP 100:** The 100 most influential clients and prospects that “know you”, “like you” and “trust you” as their real estate broker and resource for all things real estate. 100 clients has been proven to be the highest number of clients that you can manage in an authentic way. All other contacts should be categorized as “Fringe” contacts.

**Platinum Clients:** The people that refer you multiple times a year or consistently do business with you like a developer or investor. They are the top 20% of your Top 100.

**Gold Clients:** The people that refer you occasionally or have done business with you randomly over the life of your career but never refer you. They are the next 30% down in your TOP 100.

**Silver Clients:** Prospects and past clients that have the potential to refer or do consistent business with you over the life of your career. This is the bottom 50% of your TOP 100.

**Fringe Clients:** Everyone Else. They should remain on your low cost marketing campaigns like email marketing and direct mail marketing.

**“Referral Partners:”** People in other industries or real estate agents in different markets that refer you new clients. Referral partners should not be counted in your TOP 100.

**“Know You”:** Your goal is to provide enough content that your clients, prospects and consumers feel like they are being educated on the “market” through your eyes.

**“Like You”:** Your personal branding builds relationship value with your clients, prospects and the consumer. You are likable.

**“Trust You”:** You show evidence of success through your social media, email and direct mail marketing. You are someone that can be trusted to navigate a successful real estate transaction

**“Addition/Strengthen”:** Your goal is to build a TOP 100 by averaging about 20 new additions per year. Once you have hit the 100 mark, your strategy should then be you strengthen your TOP 100. A well manage TOP 100 should net a “return on database” of 20%.

**“Return On Database” (ROD):** This is the percentage of referrals your database should net you over the course of a year. A database management in a strategic, authentic and consistent way should net a return of 20%. (2 referrals for every 10 in your Top 100)

**“Time Block/Schedule a Flight”:** This is the non-negotiable time that should be scheduled in your calendar to “Follow Up” with prospects, “Follow Back” with past clients, branding and staying in touch with “Referral Partners”.

**“Evidence of Success”:** The stories and transactions that you have completed that give social proof that you are an expert at your craft. For Sale signs and “Under Contract” riders are the ultimate example.

**“Top of Mind”:** A marketing term that suggests that you are immediately thought of when one needs real estate advice, consult or representation. A database loses 10% “TOMA” every month that that it is not touched or marketing to on a consistent basis.

- READING  
RECOMMENDATIONS
- 01** *Sell It Like Serhant: How to Sell More, Earn More, and Become the Ultimate Sales Machine* by Ryan Serhant
  - 02** *Ninja Selling: Subtle Skills. Big Results.* by Larry Kendall
  - 03** *7 Levels of Communication* by Michael J. Maher
  - 04** *The Go-Giver: A Little Story about a Powerful Business Idea* by Bob Burg
  - 05** *The Millionaire Real Estate Agent* by Gary Keller

# Daily Time Management Form

Current Year Goal: \_\_\_\_\_

\_\_\_\_\_

3 Year Goal: \_\_\_\_\_

\_\_\_\_\_

Breakthrough Goal: \_\_\_\_\_

\_\_\_\_\_

Three things I must accomplish today before 7:00AM:

**1**

\_\_\_\_\_

**2**

\_\_\_\_\_

**3**

\_\_\_\_\_

Five clients/prospects I must contact today:

**1**

\_\_\_\_\_

**2**

\_\_\_\_\_

**3**

\_\_\_\_\_

**4**

\_\_\_\_\_

**5**

\_\_\_\_\_

Seven things I need to accomplish today:

**1**

\_\_\_\_\_

**2**

\_\_\_\_\_

**3**

\_\_\_\_\_

**4**

\_\_\_\_\_

**5**

\_\_\_\_\_

**6**

\_\_\_\_\_

**7**

\_\_\_\_\_

# Weekly Time Management Form

Week of: \_\_\_\_\_

My Big Three This Week:

**1** \_\_\_\_\_

**2** \_\_\_\_\_

**3** \_\_\_\_\_

Active Prospects:

**1** \_\_\_\_\_

**2** \_\_\_\_\_

**3** \_\_\_\_\_

**4** \_\_\_\_\_

**5** \_\_\_\_\_

Active Pipeline:

**1** \_\_\_\_\_

**2** \_\_\_\_\_

**3** \_\_\_\_\_

**4** \_\_\_\_\_

**5** \_\_\_\_\_

**6** \_\_\_\_\_

**7** \_\_\_\_\_

**8** \_\_\_\_\_

**9** \_\_\_\_\_

**10** \_\_\_\_\_

To Do This Week:

**1** \_\_\_\_\_

**2** \_\_\_\_\_

**3** \_\_\_\_\_

**4** \_\_\_\_\_

**5** \_\_\_\_\_

**6** \_\_\_\_\_

**7** \_\_\_\_\_

**8** \_\_\_\_\_

**9** \_\_\_\_\_

**10** \_\_\_\_\_

Personal To-Dos This Week:

**1** \_\_\_\_\_

**2** \_\_\_\_\_

**3** \_\_\_\_\_

**4** \_\_\_\_\_

**5** \_\_\_\_\_