

HOW TO USE YOUR DAILY TRACKER

The following serves as a guide to filling out your Daily Tracking Record.

BY IMPLEMENTING THE DAILY TRACKING RECORD INTO YOUR BUSINESS YOU WILL BE MAKING A COMMITMENT TO MOVE TO THE NEXT LEVEL OF SUCCESS!!

The items in “BLUE” below are fields on the form.

1. **Date:** Enter today’s date.
2. **Day of The Week:** Put a slash mark through the day of the week
3. **Name:** Please print your full name.
4. **From:** The exact time of day you begin your prospecting session
5. **To:** The exact time of day you end your prospecting session
6. **Calls:** You will most likely prospect from the Call Detail Report (800 # leads) and your Sphere of Influence list that has been entered into the database, and the prospects you have developed from your most recent customers. All these calls are accounted for in this box.

*****Coding Your Calls on your Daily Activity Records:***

/ = You dialed a telephone number.

X = You spoke to someone.

O (circle) = Appointment Set

7. **Summary Results:**

Count the above marks from the Prospecting section of your Daily Activity Record as well as the information you have noted on your Buyer Information Sheets and Seller Information Sheets and summarize them in the appropriate field on your Daily Activity Record.

For Example:

Dials: The total number of “Xs” and “/s” is the number of dials

Contacts: The total number of “Xs” is the number of contacts

Appointments: The total number of Circle’s around a number

Leads: You will need to count your Buyer and Seller Information Sheets you have filled out during today’s prospecting session in order to determine the following information:

Buyer: The total number of Buyer Information Sheets you have filled out during today’s prospecting session is the number of Buyer Leads.

Seller: The total number of Seller Information Sheets you have filled out during today’s prospecting session is the number of Seller Leads.

Lender: The total number of prospects you have referred to a lender during today’s prospecting session is the number of Lender Leads.

Future: The total number of Buyers or Sellers during today’s prospecting session that wants to do something beyond 30 days (B and C Prospects) is the number of Future Leads

Buyer Appointments Set: The total number of Buyer appointments set.

Seller Appointments Set: The total number of Seller appointments set or Listing Leads given to your Primary Agent on completed Seller Information Sheets.

NOTE: The Numbers Will Not Necessarily Add Up.

8. Schedule/Activities:

This area allows you to plan your entire day. Usually, we know what our day will entail before it starts. We know from our Ideal Weekly Schedule which recurring events we will transcribe to our Daily Activity Record. We also know that required APPOINTMENTS must be set. APPOINTMENTS with customers/clients, home inspectors, appraisers, etc. are listed in this box. Allocation of time for prospecting and follow-up calling is listed in this box. Block off time for unanticipated activities in this box. Minimize substituting these “unanticipated” events with recurring events and events you have scheduled that are time sensitive. Finally, make sure you block times for lunch, dinner and other personal items.

9. Prioritized Task List:

This is your “To Do” list. It delineates those tasks you should get done (that must get done) in the course of doing your real estate business. Every entry is not an “A” task. For example, dropping a document off to a seller is more important than ordering a closing gift; consequently, this is an “A” task. These tasks are to be checked off as they are accommodated and accomplished in the “Schedule/Activities” portion of the Daily Activity Record. View the example of a Daily Activity Record, and you will see that ordering closing gifts would likely get checked as a completed task under the “Schedule/Activities” section delineated as “Office Work”.

10. Results/Opportunities/Issues:

****Results:** This is where you note the outcomes of your prospecting calls, follow-up calls, lead follow-up calls, calls in which you were asked to call again or tasks you derived as a result of an appointment you may have had with prospective or actual customers/clients. The example of a Daily Activity Record provides some sample entries.

****Opportunities:** An opportunity is derived from ALL categories of buyers. You will note an opportunity that is obtained from your prospecting calls, follow-up calls or lead follow-up calls. “A” Buyers represent an opportunity, the Buyer Information Sheet is completed and submitted, and contact is maintained throughout the buying process. Complete the Buyers Information Sheet, accordingly for “B” and “C” buyers that are obtained the same as above.. This allows us to add these potential buyers to our database as future leads. These opportunities may be nurtured by adding these leads to our mailing list or automated MLS email updates. The example on the Daily Activity Record that shows “add to email service” represents an opportunity.

****Issues:** Notes are made detailing any concerns you have dealing with customers/clients. You make a note that this is a “difficult client” and will require intervention by your Primary Agent; differences between agent and customer/client that may require resolution by our Team Leader at the company level; or some discussion (Scripts To Dialogs) may be required with respect to “closing the deal”.

****Ad & Sign Calls:** Every customer/client we serve does not come to you from nowhere. They are referred or have seen one of your advertisements. Noting this on the Daily Activity Record allows us to keep track of how you are obtaining customers. These notes allow us to identify and quantify your leads. Consequently, we can spend

advertising dollars where they gain us the most benefit.

11. **3 Past Clients; 2 Appointments; Your 1 Thing for Today:** This is where you want to list your 3 Past Clients that you will contact today, the name of your 2 Appointments, the one 1 Thing you want to focus on for Today
12. **Number of Zero Transfers:** This block accounts for ANY calls you receive as a result of the Zero Transfer feature of the teams 800 hotline.
Refer to Paragraph #1 (Annotating Your Calls) for indicating dials (/) and contacts (X). It may become necessary to annotate that "Follow-up Calls" or "Lead Follow-up Calls" led to a buyer, seller, pre-qualification or any of the other categories. Use the codes provided and note the outcome in the "Results/Opportunities/Issues/Ad & Sign Calls" section of the Daily Activity Record.
13. **Email Follow up:** This block accounts for ANY emails you send that will have resulted from a prospecting call that you were asked to follow up with; a lead given you via the Buyer Information Sheet; emails you make to Team affiliates (lenders, title company, etc.) that assist us in closing the deal; or calls you make as a task per the "Schedule/Activities" component of the Daily Activity Record.
14. **Follow-Up Calls:** This block accounts for ANY calls you make that will have resulted from a prospecting call for which you were asked to call again; a lead given you via the Buyer Information Sheet; calls you will make to Team affiliates (lenders, title company, etc.) that assist us in closing the deal; or calls you make as a task per the "Schedule/Activities" section of the Daily Activity Record.
15. **Note Cards Sent:** This block accounts for ANY Note Cards you send that will have resulted from a prospecting call that you were asked to follow up with; a lead given you via the Buyer Information Sheet; note cards you send to Team affiliates (lenders, title company, etc.) that assist us in closing the deal; or note cards you send as a task per the "Schedule/Activities" component of the Daily Activity Record.
16. **Homes Previewed:** This block accounts for ANY Homes that you have previewed. This would include ALL of your team listings and any homes for potential buyers.
17. **B's Into Drip System:** This block accounts for ANY B buyers or B sellers that you have entered into your automated email drip systems.
18. **C's Into Drip System:** This block accounts for ANY C buyers or C sellers that you have entered into your automated email drip systems.
19. **Texting Follow Up:** This area allows you to track how many follow up texts you send daily
20. **Open House Attendees:** This block accounts for the number of people that attended your open houses.
21. **Year Closed To Date:** This section is where you will add on a daily basis the total number of units closed.
22. **Year To Date (YTD) Goal:** This section is where you will put your goal of number of closed units for the year.