

# Schedule

# Daily CRM & Lead Management System

## *The Bayli Way*

### Non-Negotiables (Every Single Day)

- Do **NOT** leave the office with:
  - Unanswered calls
  - Unanswered texts
- Inbox should be at **ZERO** by end of day

### Start of Every Day (Morning Routine)

Clear everything in this order:

1. **Voicemails**
2. **Texts**
3. **New Leads**
4. **Message Board / Inbound Requests**

### Simple Weekly Flow (Big Picture)

- **Mon–Tue:** Work all new leads fast
- **Wed:** Clean and organize everything
- **Thu:** Sell and exceed goals
- **Fri:** Follow up and reset pipeline

### Core Focus

- Stay ahead
- Stay organized
- Close more deals

## Daily Accountability (All Week Long)

### Call Activity

- By **11:00 AM**:
  - Be close to **100 calls**
  - If behind → **shift focus immediately**

### CRM Actions

- Move leads **or** leave a voicemail/text
- Update:
  - **Last Contact** on every lead
- Keep:
  - Follow-up list accessible (paper or CRM)

## Weekly Workflow Breakdown

### **Monday – Tuesday: Attack New Leads**

#### Primary Focus: Speed to lead + first contact

- Call **every new lead**
- If no answer:
  - Leave a voicemail **OR**
  - Send a text
- **No skipping leads**
- Respond to **every inbound call/text immediately**

### **Wednesday: Clean & Organize**

#### Primary Goal: All new leads cleared

- Every lead should be:
  - Moved to next step **OR**
  - Marked appropriately (N/A, not interested, etc.)
- Review:
  - **Conversations tab**
- Stay on top of:
  - Active conversations
  - Follow-ups

### **Thursday: Production + Organization**

**Primary Goal: Be above minimum sales goal**

- Push for **extra sales**
- Update:
  - Opportunity notes
- Ensure pipeline is:
  - **Organized by “Last Contact”**

### **Friday: Follow-Up & Reset**

**Primary Goal: Clean pipeline + set up next week**

- Work:
  - Callbacks
  - Follow-up conversations
- Clean:
  - All lists and pipelines
- Prepare:
  - Set yourself up for success for next week

# Checklist

## DAILY CRM & SALES CHECKLIST

### START OF DAY (MORNING RESET)

- Clear all **Voicemails**
- Respond to all **Texts**
- Work all **New Leads**
- Check **Message Board / Inbounds**

### CALL ACTIVITY TRACKING

- By 11:00 AM → Near **100 calls**
- If behind → Adjust immediately

### END OF DAY CHECK

- Inbox = ZERO
- All leads touched or moved
- Last Contact updated
- Notes completed
- Follow-ups set

## DAY-BY-DAY FOCUS

*Weekly Standard: Stay Organized – Stay Ahead – Close Deals*

### MONDAY – TUESDAY (NEW LEADS)

- Call every new lead
- No skipped leads
- Respond to all inbound activity

### WEDNESDAY (CLEAN & ORGANIZE)

- All new leads cleared
- Leads moved to next step or closed out
- Review **Conversations Tab**
- Follow up on active conversations

### THURSDAY (SALES + PIPELINE)

- Push for **above goal sales**
- Update all opportunity notes
- Organize pipeline by **Last Contact**

### FRIDAY (FOLLOW-UP + RESET)

- Work all callbacks
- Follow up all conversations
- Clean all pipelines/lists
- Set up next week