

Daily/Weekly Accountability Tracker

Week of _____

Leads						
<u>Received</u>	<u>Conversations</u>	<u>Converted</u> (Spoke to and Qualified)	<u>Sent to Lender</u>	<u>Converted to Appointment</u>		
Clients						
<u>Buyer Contracts Signed</u>	<u>Listing Contracts Signed</u>	<u>Houses Shown</u>	<u>Offers Made</u>	<u>Offers Accepted</u>	<u>Deals Closed</u>	<u>Deals Died</u>
Open Houses						
<u>Conducted</u>	<u>Unrepresented Leads</u>	<u>Converted</u> (Spoke to and Qualified)	<u>Sent to Lender</u>	<u>Converted to Appointment</u>		
Miscellaneous						
<u>Added to SOI (non-leads)</u>	<u>Referrals Received</u>	<u>Reminders</u>				
		1. Set E- Alerts for all non-converted leads including open house 2. Leave leads as new unless you qualify them 3. Make sure they are enrolled in Default buyer Drip Campaign				
<u>Prospecting Day Tasks (In This Order)</u>			<u>What to do once you qualify a lead</u>			
1. Reach out to leads that came in after midnight call/text/alerts 3. Call your top 25 4. Call your "New" leads in Planet 5. Call "old and cold" power dialer in planet 6. Every Wednesday send mass text & email to Cold and Old Leads.(hail mary in drive)			1. Set appointment 2. Set up alerts 3. Send Welcome Email with Lender Info and Site Access 4. Unsubscribe from drip campaign 5. Change status from "new" to warm/hot if in your top 25 6. Change "type" example: "buyer" or "buyer/seller" 7. Mark conversion date under contact info 8. Set up with correct drip campaign in Planet (A,B,C)			