



Broker Ultimate Tracking System

Name \_\_\_\_\_ Date \_\_\_\_\_

Annual Goal: \_\_\_\_\_ **Based on Financial and Profitability Worksheet**

**Lead Generation Focus Results**

1. Sphere of Influence (SOI)  
 Contacts: \_\_\_\_\_  
 Leads: \_\_\_\_\_

2. Open Houses **Broker tallies all results for the week**  
 Contacts: \_\_\_\_\_  
 Leads: \_\_\_\_\_

3. \_\_\_\_\_  
 Contacts: \_\_\_\_\_  
 Leads: \_\_\_\_\_

New Leads		code
1	John Buyer	B/OH
2	Betty Seller	S/OH
3	Frank Referral	R/S
4		
5		
6		
7		
8		
9		
10		

Current Clients/Showings/List Appt		code
1	John Buyer	B/OH
2	Betty Seller	S/OH
3	Frank Referral	R/S
4		
5		
6		
7		
8		
9		
10		

Engagement Activities		code
1	25 SOI	C
2	25 SOI	N
3	150 Intro Letters	E
4	5 Coffee Meetings	I
5		
6		
7		
8		
9		
10		

Follow Up		code
1	Betty Seller	N/C
2		
3		
4		
5		
6		
7		
8		
9		
10		

Skill Development	
1	
2	
3	
4	
5	
Vital Goals For The Week	
1	
2	
3	
4	

**Based on Financial and Profitability Worksheet**

**Broker tallies all results for the week**

**Broker tallies all new leads for the week. Mentor coaches to follow up activities.**

**Help Broker fill out and check in with Broker. Coach, guide and assist as needed.**

**Have Broker fill out based on Mentor Program or Mentor Assignments. Follow up following week. Make sure Activity is in Time Blocking Calendar.**

**Have Broker fill out based on Clients, Mentor Program or Assignments. Follow up following week. Make sure Activity is in Time Blocking Calendar.**

**Broker tallies all activities for the week**

**Help Broker fill out and check in with Broker. Coach, guide and assist as needed.**

**Place Activities in order of importance**

**CODES**

C – Live Call | E – eMail | N – Note | I – In Person | B – Buyers | S – Seller | **1 / 2 / 3 – Focus** | OH – Open House | R – Referral

(Don't forget your day off)

		Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
<b>X</b>	<b>Weekly Events</b>	Daily Ideas	Kickoff weekend Open House Buyer Showings Listing Appointments	1 <sup>st</sup> Thing Monday Follow Up Monday Planning Time Handwritten Notes	Tour/Preview Tuesday Office Meeting Accountability/Track Database Add/Update	Engagement Wednesday Networking Group Face to Face Meetings Call/text Sphere	Technology Thursday Campaign item sent Blog/Website Update Prop Track/Mobile App	Listing Launch Friday Social Media Posts Early Entry Events Invitations/Flyers	Kickoff weekend Open House Buyer Showings Listing Appointments
	Attend Office Meeting								
	Attend CRM/Accountability								
	Hold an Open House								
	Outgoing Referral Given								
	Goal/Affirmation Review								
	Expertise Development Activity								
<b>#</b>	<b>Weekly Activities</b>								
	Calls								
	Handwritten Notes								
	Face to Face Meetings								
	CRM Campaign Items Sent								
	Property Tracker Accts Setup								
	Mobile App Link sent/download								
	Social Networking								

**\*\*Put these Appointments in Your Personal Calendar**

Help Broker fill out using first page. Have Broker fill out based on Clients, Mentor Program or Assignments. Follow up following week. Coach, guide and assist as needed.

**New Database Additions**

Name	Address	City	State	Zip	A/B/C	Email	Phone	Spouse	Prop Tracker	Mobile App
Betty Seller	123 E. Main St.	Sellerton, WA	98000	A	BettyS@gmail.com	555/1212	Frank	yes	yes	
John Buyer	9876 76 <sup>th</sup> St SE	Buyerville, WA	98222	A	JohnB@hotmail.com	359-3591	Susan	yes	yes	

Have Broker fill out weekly prior to meeting and turn in to Broker Services.

**\*\*Turn These Names In To Broker Services To Add To Database**