



Broker Ultimate Tracking System

Name _____ Date _____

Annual Goal: _____

Lead Generation Focus Results

1. Sphere of Influence (SOI)
 Contacts: _____
 Leads: _____

2. Open Houses
 Contacts: _____
 Leads: _____

3. _____
 Contacts: _____
 Leads: _____

New Leads		code
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

Current Clients/Showings/List Appt		code
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

Engagement Activities		code
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

Follow Up		code
1		
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	

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	
X	Weekly Events	Daily Ideas	Kickoff weekend Open House Buyer Showings Listing Appointments	1 st 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								
#	Weekly Activities	Morning							
	Calls								
	Handwritten Notes								
	Face to Face Meetings								
	CRM Campaign Items Sent	Afternoon							
	Property Tracker Accts Setup								
	Mobile App Link sent/download								
	Social Networking	Evening							

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

New Database Additions

Name	Address	City	State	Zip	A/B/C	Email	Phone	Spouse	Prop Tracker	Mobile App

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