

SPHERE OF INFLUENCE TRACKER

MAIN LEAD SOURCES

Past Client/Sphere/Database
Farm
Internet Leads
Open Houses
Expired FSBO/MMM

OTHER SOURCES

- 800 Call Capture
- Accountants
- Absentee Owners
- Affiliate Referrals
- Agent to Agent Referrals
- Attorneys
- Blogging
- Builder
- Buyer Seminars
- Cancel Contracts
- Company Referrals
- Current Client Referrals
- Corporate/Business Accounts
- Demographic
- Direct Mail
- Facebook/
- Financial Planner
- Floor Time
- Former Realtor
- Google Ads
- Instagram
- Investors
- Just Listed/
- LinkedIn
- Networking Assistant
- Home Sales
- Notice Defaults
- Traditional Operation
- Relocation
- REO
- Sign Calls
- Sphere of Influencer
- Team Sphere
- Tiktok
- Twitter
- Website
- Youtube

[illegible]

NOTES:

LEAD GENERATION SYSTEM

MAIN LEAD SOURCES

Past Client/Sphere/Database
Farm
Internet Leads
Open Houses
Expired FSBO/MMM

OTHER SOURCES

800 Call Capture
Accountants
Absentee Owners
Affiliate Referrals
Agent to Agent Referrals
Attorneys
Blogging
Builder
Buyer Seminars
Cancel Contracts
Company Referrals
Current Client Referrals
Corporate/Business Accounts
Demographic
Direct Mail
Facebook/
Financial Planner
Floor Time
Former Realtor
Google Ads
Instagram
Investors
Just Listed/
LinkedIn
Networking Assistant
Home Sales
Notice Defaults
Traditional Operation
Relocation
REO
Sign Calls
Sphere of Influencer
Team Sphere
Tiktok
Twitter
Website
Youtube

Name:	Designed to Generate_____Revenue
Basic System Outline:	
Team PLayers Involved:	Estimated Cost of System &_____

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Name:	Designed to Generate_____Revenue
Basic System Outline:	
Team PLayers Involved:	Estimated Cost of System &_____

NOTES:

FACEBOOK ADVERTISING

Month of: _____

Monthly Budget: _____

CAMPAIGN NAME	
CAMPAIGN DURATION	
AMOUNT SPENT	
TARGETS: #TOOTAL RACH #TOTAL LEADS	
TARGET AUDIENCE	
TOTAL REACH	
LEADS GENERATED	
COST PER LEAD	
☐ TARGET REACHED! ☐ LET'S TRY AGAIN!	

CAMPAIGN NAME	
CAMPAIGN DURATION	
AMOUNT SPENT	
TARGETS: #TOOTAL RACH #TOTAL LEADS	
TARGET AUDIENCE	
TOTAL REACH	
LEADS GENERATED	
COST PER LEAD	
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CAMPAIGN DURATION	
AMOUNT SPENT	
TARGETS: #TOOTAL RACH #TOTAL LEADS	
TARGET AUDIENCE	
TOTAL REACH	
LEADS GENERATED	
COST PER LEAD	
☐ TARGET REACHED! ☐ LET'S TRY AGAIN!	

LISING LEAD TRACKER

NAME: _____ DATE: _____ ☐ PROSPECT ☐ CLIENT

CONTENT INFO

Address: _____

City: _____

St: _____

Zip: _____

Email: _____

☐ Work

☐ Home

☐ Newsletter

1st Phone: _____

☐ Call

☐ Text

2nd Phone: _____

☐ Call

☐ Text

Birthday: _____

Spouse/Sig Other: _____

Kids: _____

Pets: _____

Source: _____

Next Contract: _____

☐ in Call

Reason for Moving: _____

Date Moving: _____

SOCIAL MEDIA

☐ Followed on Facebook

☐ Connected on LinkedIn

☐ Followed on Pinterest

☐ Subscribed on Youtube

☐ Followed on Facebook

☐ Followed on Twitter

☐ Other

FOLLOW UP CONTACTS

1. _____

Date: _____

☐ Call

☐ Email

☐ Text

☐ Soc Med

☐ Mail

Notes: _____

1. _____

Date: _____

☐ Call

☐ Email

☐ Text

☐ Soc Med

☐ Mail

Notes: _____

1. _____

Date: _____

☐ Call

☐ Email

☐ Text

☐ Soc Med

☐ Mail

Notes: _____

1. _____

Date: _____

☐ Call

☐ Email

☐ Text

☐ Soc Med

☐ Mail

Notes: _____

Notes

OPEN HOUSE PLANNER

PROPERTY:

OPEN HOUSE DATE:

BEFORE OPEN HOUSE:

- ☐ Develop & circulate marketing material
- ☐ Post to social media include in email newsletter, blogs, posts, etc.
- ☐ Add open house date & time to MLS
- ☐ Prepare open house packet-listing sheet, disclosures, blank offer forms, etc.
- ☐ Research comparable properties
- ☐ Advise seller of last minute to-do's (cleaning, organizing, pet care, landscaping, etc.)
- ☐ Other activities: _____

OPEN HOUSE DAY:

- ☐ Open blinds, turn on lights (light candles, etc.)
- ☐ Place guest book or sign-in sheet and pen in entry area
- ☐ Display flyers and business cards
- ☐ Other activities: _____

FOLLOW UP:

- ☐ Prepare report for sellers detailing open house activity
- ☐ Contact interested parties & send requested information
- ☐ Set appointments for second showings if necessary
- ☐ Other activities: _____

Notes _____

DAILY AFFIRMATIONS

DAILY PLANNER

DATE:

M T W T F S S

TODAY I AM GRATEFUL FOR:

TO-DO'S

TOP 3 GOALS TODAY

NOTE'S

PROSPECT TRACKER

APPOINTMENTS

AM

NOON

PM

BUSINESS EXPENSES

Today's Miles _____ Misc Expenses _____

Parkings, Tolls, Coffee, Etc. _____

BUSINESS OVERVIEW

TARGET MARKET

DEMOGRAPHIC

GEOGRAPHIC

PSYCHOGRAPHIC

BEHAVIORAL

OPERATONS PLAN

OPERATIONAL
HOURS: _____

OPERATIONAL
DAYS: _____

VENDOR/PARTNER NAME:

WHAT THEY SUPPLY:

CONTACT:

EMPLOYEE NEEDED:

THE COMPETITION

COMPETITOR ONE:

COMPETITOR TWO:

STRENGTH

WEAKNESS

OPPORTUNITIES

THREATS

INCOME GOALS

TAKE HOME INCOME GOAL

GROSS COMISSION INCOME
NEED TO REACH GOAL

SALES VOLUME
NEED TO REACH GOAL

ANNUAL TRANSATIONS REQUIRED TO REACH GOAL

BUYERS CLOSED

SELLERS CLOSED

BUYERS ENGAGED

LISTING APPOINTMENTS

CONVERSATIONS CALCULATIONS

TOTAL DAILY
New Prospect
Conversations Needed

AUTOMATED EMAIL PLANNER

CAMPAIGN NAME: _____

LIST NAME: _____

SUBJECT NAME:	TO-DO: ☐ WRITE ☐ ADD IMAGES ☐ ADD LINK ☐ PROOFREAD ☐ PREVIEW/TEST ☐ SEND
TEASER TEXT:	
MESSAGING CONSIDERATIONS:	
CALL TO ACTION:	
SCHEDULE:	DATE STARTED: DATE ENDEND: OPENS: CLICKS:

SUBJECT NAME:	TO-DO: ☐ WRITE ☐ ADD IMAGES ☐ ADD LINK ☐ PROOFREAD ☐ PREVIEW/TEST ☐ SEND
TEASER TEXT:	
MESSAGING CONSIDERATIONS:	
CALL TO ACTION:	
SCHEDULE:	DATE STARTED: DATE ENDEND: OPENS: CLICKS:

SUBJECT NAME:	TO-DO: ☐ WRITE ☐ ADD IMAGES ☐ ADD LINK ☐ PROOFREAD ☐ PREVIEW/TEST ☐ SEND
TEASER TEXT:	
MESSAGING CONSIDERATIONS:	
CALL TO ACTION:	
SCHEDULE:	DATE STARTED: DATE ENDEND: OPENS: CLICKS:

MISSION & VISION STATEMENT

VISION STATEMENT

MISSION STATEMENT

SOCIAL MEDIA POST PLANNER

Week of: _____

POST ONE					
POST TOPIC/THEME					
CALL TO ACTION			POST TYPE ☐ VIDEO ☐ IMAGE ☐ QUOTE		
AUDIENCE		POST STRUCTURE		TIME POSTED	REACTIONS
☐ BUYER ☐ SELLER ☐ _____	☐ BEGINNER ☐ INTERMEDIATE ☐ ADVANCED	☐ LIST ☐ INFORMATIONAL ☐ HOW TO/TUTORIAL	☐ Q & A ☐ REVIEW ☐ _____		
POSTED TO:			CREATED SCHEDULED PUBLISHED		

POST TWO					
POST TOPIC/THEME					
CALL TO ACTION			POST TYPE ☐ VIDEO ☐ IMAGE ☐ QUOTE		
AUDIENCE		POST STRUCTURE		TIME POSTED	REACTIONS
☐ BUYER ☐ SELLER ☐ _____	☐ BEGINNER ☐ INTERMEDIATE ☐ ADVANCED	☐ LIST ☐ INFORMATIONAL ☐ HOW TO/TUTORIAL	☐ Q & A ☐ REVIEW ☐ _____		
POSTED TO:			CREATED SCHEDULED PUBLISHED		

Notes

CONTENT STRATEGY



BLOG POST TO DO

POST STRUCTURE: HOW TO ORGANIZE THE POST

List	Q & A
How To/ Tutorial	Review
Informational	Opinion Video

- Add section/Headings
- Add Call to Action
- SEO-Add your keywords
- Proofread
- Add Tags
- Add Categories
- Add Featured Image
- Cross Promote across social and email

VIDEO POST TO DO

VIDEO TYPE: COULD BE LIVE OR RECORDED

Interview	New Listing
Local Business Review	Informational
How To/ Tutorial	Neighborhood Tour

- Select video type
- Create Script
- Secure Video Location
- Set up sound/light
- Record
- Add voiceover/Edit (optional)
- Add featured image/Music
- Review and finalize
- Add description/Title
- Final Video Delivery Social Media and email

CONPOST BRAINSTORMING GUIDE

WHAT	POST TOPIC:	
	WRITE DOWN THE MAIN IDEA OR THEME YOU WANT TO WRITE ABOUT	

WHO	YOUR AUDIENCE	☐ BEGINNER ☐ INTERMEDIATE ☐ ADVANCED	HOW	POST STRUCTURE	☐ LIST ☐ HOW TO/TUTORIAL ☐ INFORMATIONAL
	HOW KNOWLEDGABLE IS YOUR AUDIENCE ON THIS TOPIC	☐ BUYER ☐ SELLER ☐ _____		HOW DO YOU PLAN TO ORGANISE THE POST? WHICH OF THESE TYPES WILL YOU USE?	☐ Q & A ☐ REVIEW/OPINION ☐ _____

WHY	REASON FOR POST		WHEN	POST DATE:	
	WHY DO YOU FEEL THIS POST WOULD BE IMPORTANT/INTERESTING TO YOUR READERS?			WHEN DO YOU PLAN TO PUBLISH THE POST?	

IDEAS:

TO-DO'S:

[illegible]

CONTENT BRAINSTORM

CORE TOPIC POSTS		FREQUENCY	PURPOSE
		☐ DAILY	☐ EDUCATIONAL
		☐ WEEKLY	☐ ENGAGING
		☐ MONTHLY	☐ INSPIRING
		☐ _____	☐ _____
		WILL AUDIENCE FIND THIS USEFUL/VALUABLE?	
		☐ YES (SCHEDULE AND/OR POST)	
		☐ NO/MAYBE (DO RESEARCH/ASK AUDIENCE)	

LIFESTYLE POSTS		FREQUENCY	PURPOSE
		☐ DAILY	☐ EDUCATIONAL
		☐ WEEKLY	☐ ENGAGING
		☐ MONTHLY	☐ INSPIRING
		☐ _____	☐ _____
		WILL AUDIENCE FIND THIS USEFUL/VALUABLE?	
		☐ YES (SCHEDULE AND/OR POST)	
		☐ NO/MAYBE (DO RESEARCH/ASK AUDIENCE)	

SPECIFIC POSTS		FREQUENCY	PURPOSE
		☐ DAILY	☐ EDUCATIONAL
		☐ WEEKLY	☐ ENGAGING
		☐ MONTHLY	☐ INSPIRING
		☐ _____	☐ _____
		WILL AUDIENCE FIND THIS USEFUL/VALUABLE?	
		☐ YES (SCHEDULE AND/OR POST)	
		☐ NO/MAYBE (DO RESEARCH/ASK AUDIENCE)	

BUSINESS EXPENSES

ITEM	THIS YEARS EXPENSES		LAST YEARS EXPENSES	
	MONTHLY	NOTES	MONTHLY	NOTES
DUES (RE BOEARD DUES/MLS DUES)				
BUSINESS ENTERTAINMENT (MEALS, COFFEE, COCKTAILS, EVENTS)				
COACHING				
COMMUNICATION (MOBILE, BUSINESS LINE, INTERNET)				
EDUCATION (SEMINARS, BOOKS, CD'S, ETC.)				
EQUIPMENT & SUPPLIES (LAPTOP, OFFICE SUPPLIES, ETC.)				
ACCOUNTING/PA/LEGAL(TAXES)				
MARKETING				
PRINT ADVERTISING				
ONLINE ADVERTISING/WEBSITE				
DIRECT MALL				
SIGNGS, FLYERS, BROCHURES, PRESENTATION MATERIALS				
EDUCATION (SEMINARS, BOOKS, CD'S, ETC.)				
PROMOTIONAL (GIFTS, EVENTS, SPONSORSHIPS, ETC.)				
MARKETING CONSULTING				
OTHER MARKETING_____				
OTHER COSTS				
MISC. SALES COST (INSPECTIONS, REPAIRS, GOODWILL, STAGING, ETC.)				
OUTSIDE SERVICES (CONSULTING, BOOK KEEPING, ETC.)				
TRANSACTION COORDINATION				
TRAVEL EXPENSE (AIRFARE, LODGING, GROUND TRANSPORTATION, INCIDENTALS)				
IRA CONTRIBUTION				
WAGES (ASSISTANT, EMPLOYEES)				
OTHER EXPENSE_____				
TOTAL BUSINESS EXPENSES	\$		\$	

YEARLY FINANCE TRACKER

Month of: _____

DATE	INCOME AMOUNT	TRANSACTION DETAILS

TOTAL GROSS INCOME:

DATE	INCOME AMOUNT	TRANSACTION DETAILS

TOTAL EXPENSES:

Notes

YEARLY FINANCE TRACKER

Year: _____

	TOTAL GROSS INCOME	TOTAL EXPENSES	TOTAL NET INCOME
JANUARY			
FEBRUARY			
MARCH			
APRIL			
MAY			
JUNE			
JULY			
AUGUST			
SEPTEMBER			
OCTOBER			
NOVEMBER			
DECEMBER			

Notes

BILL PAYMENT TRACKER

[illegible]

NOTES

VISION BOARD



BIRTHDAYS

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

2023 CALENDAR

JANUARY

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

FEBRUARY

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

MARCH

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13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

APRIL

S	M	T	W	T	F	S
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3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

MAY

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8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

JUNE

S	M	T	W	T	F	S
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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

JULY

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17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

AUGUST

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21	22	23	24	25	26	27
28	29	30	31			

SEPTEMBER

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25	26	27	28	29	30	

OCTOBER

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23	24	25	26	27	28	29
30	31					

NOVEMBER

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20	21	22	23	24	25	26
27	28	29	30			

DECEMBER

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11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

2024 CALENDAR

JANUARY

S	M	T	W	T	F	S
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7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

FEBRUARY

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
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MARCH

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

APRIL

S	M	T	W	T	F	S
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7	8	9	10	11	12	13
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28	29	30				

MAY

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30						

JULY

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AUGUST

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SEPTEMBER

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OCTOBER

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NOVEMBER

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DECEMBER

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14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

MONTHLY CALENDAR

Month of: _____

M	T	W	T	F	S	S

Notes

CONTACT LIST
















































































