## Accountability Checklist 2018

Activity	Action	Rate	Action by Date
Prospecting	Diary weekly prospecting activities –		
	Database calls & texts		
	Farm area activities,		
	Door knocking,		
	Personal promotion – Online & Print,		
	Open Homes,		
	Social media posts - Facebook, Instagram, snapchat		
	Diary (30/45/60 min) periods for prospecting		
	Prepare scripts and dialogues for prospecting calls & practice them		
	Use a Scorecard to record each call connected		
	Call all Open Home visitors after property sold.		
	Community involvement		
Listing	Review and update personal listing presentation material		
	Review and update my personal profile		
	Update professional photographs		
	Appraisal follow up calls diarised (3/6 monthly)		
	Review and update my pre-listing pack		
	Review and update seller testimonials		
	Practise scripts and dialogues for listing presentations		
	Role play presentations		
	Research and memorise sales stats in local area		
Client	Learn and use database software		
database	Update database to ensure it is current and accurate		
	Add to database every week (eg open home visitors, friends, colleagues, contacts, Facebook & Instagram followers)		
Open Homes	Add evening Open Homes to campaigns		
	Update old open home signs & flags,		
	Use Harcourts iPad app		
	Open Home Invites printed & distributed.		

## Harcourts

Coller reviews	Drepare Coller review list	
Seller reviews	Prepare Seller review list	
	Schedule seller review meetings (in office)	
	Update seller file, buyer feedback, new CMA	
	Prepare seller paid marketing packages	
	Prepare auction marketing packages	
	Prepare scripts and dialogues for seller review meetings & presentations	
Seller paid	Prepare 'Seller Paid Advertising' packages	
advertising	Prepare scripts and dialogues for SPA presentations & practice them	
	Prepare a summary of successful marketing programmes, get quotes from Sellers who have invested in SPA, collect sold fliers, photos of home, price sold, testimonials, marketing programme used with investment made by seller	
	Review list of current sellers and identify sellers needing to upgrade their marketing	
	Call sellers and schedule meeting times to review their marketing programme (Book Auctioneer for meeting)	
	Aim to get SPA for at least one piece of marketing with every listing e.g. professional photography	
Negotiation &	Prepare scripts and dialogues for 'asking for the offer'	
handling	Prepare scripts and dialogues for 'presenting the offer'	
objections	Prepare scripts and dialogues for handling objections (price, counter offers, auction, property features)	
	Practise my negotiation scripts & dialogues	
	Practise role plays	
	Practise active listening	
	Memorise stats on the local market, sales, competition	
Personal promotion	Prepare client emails (newsletters, open home lists, post cards, testimonials, awards, newsletters, EDMs)	
(Online)	Update my personal website, Promote using Social Media	
	Use Google ad words for my name & the suburb I work	
	Post & build followers on Facebook & Instagram	
	Schedule & send regular texts to clients	
	Utilise videos – Listings, Successful Auctions	
	Send 'personalised or thank you' notes	
Personal Promotion	Send client experience communications (Birthday cards, 'send me referrals' postcards, gifts, invites to events) on a 3/6/12 monthly basis	
	Schedule a client event.	

## Harcourts

Refresh all current personal print material		
Post mail to clients (newsletters, open home lists, property mail outs, post cards, testimonials, awards)		
Post my professional brochure		
Utilise personal advertising in newspapers, magazines, bill boards, bus backs		
Send client gift promotions (note pads, fridge magnets, pens, calendars, garden seeds, scratchies)		
Get car branded		
Run & post info on fundraisers for Foundation/charity events		
Diary key activities – prospecting calls – schedule 30/45/60 min uninterrupted blocks of time		
Return phone calls in groups at set times		
Paper – handle & read once only, do it, delegate it or dump it		
Email – schedule regular times to send and respond to emails – read once only, do it, delegate it or delete it, Disable 'alerts'		
Set aside 10mins (Sunday/Wednesday) to plan the week's key activities		
Do any difficult task/call/action first		
Prepare a 'to do' list		
Purchase an annual wall planner calendar		
Complete wall planner for year ahead, schedule Holidays and days off, family and friend's events (Birthdays, School & Sport dates)		
Schedule Marketing mail outs, office meetings, training dates & events, Harcourts Conference, EOY awards, Client functions/sponsorship events, key business activities & communications		
Complete business expense summary. GST returns, tax		
returns, investigate Xero		
Meet with Accountant		
Review savings plan (10%)		
Update assets and liabilities list, arrange mortgage finance approval		
Complete a debt review/restructure – meet with financial planner		
Investigate purchasing an investment property		
Review Will, Personal, Income protection & Business Insurance & Trust structures		
	Post mail to clients (newsletters, open home lists, property mail outs, post cards, testimonials, awards) Post my professional brochure Utilise personal advertising in newspapers, magazines, bill boards, bus backs Send client gift promotions (note pads, fridge magnets, pens, calendars, garden seeds, scratchies) Get car branded Run & post info on fundraisers for Foundation/charity events Diary key activities – prospecting calls – schedule 30/45/60 min uninterrupted blocks of time Return phone calls in groups at set times Paper – handle & read once only, do it, delegate it or dump it Email – schedule regular times to send and respond to emails – read once only, do it, delegate it or delete it, Disable 'alerts' Set aside 10mins (Sunday/Wednesday) to plan the week's key activities Do any difficult task/call/action first Prepare a 'to do' list Purchase an annual wall planner calendar Complete wall planner for year ahead, schedule Holidays and days off, family and friend's events (Birthdays, School & Sport dates) Schedule Marketing mail outs, office meetings, training dates & events, Harcourts Conference, EOY awards, Client functions/sponsorship events, key business activities & communications Complete business expense summary, GST returns, tax returns, investigate Xero Meet with Accountant Review savings plan (10%) Update assets and liabilities list, arrange mortgage finance approval Complete a debt review/restructure – meet with financial planner Investigate purchasing an investment property Review Will, Personal, Income protection & Business Insurance	Post mail to clients (newsletters, open home lists, property mail outs, post cards, testimonials, awards)Post my professional brochureUtilise personal advertising in newspapers, magazines, bill boards, bus backsSend client gift promotions (note pads, fridge magnets, pens, calendars, garden seeds, scratchies)Get car brandedRun & post info on fundraisers for Foundation/charity eventsDiary key activities – prospecting calls – schedule 30/45/60 min uninterrupted blocks of timeReturn phone calls in groups at set timesPaper – handle & read once only, do it, delegate it or dump it Email – schedule regular times to send and respond to emails – read once only, do it, delegate it or delete it, Disable 'alerts' Set aside 10mins (Sunday/Wednesday) to plan the week's key activitiesDo any difficult task/call/action first Prepare a 'to do' listPurchase an annual wall planner calendar Complete wall planner for year ahead, schedule Holidays and days off, family and friend's events (Birthdays, School & Sport dates)Schedule Marketing mail outs, office meetings, training dates & events, Harcourts Conference, EOY awards, Client functions/sponsorship events, key business activities & communicationsComplete business expense summary, GST returns, tax returns, investigate Xero Meet with Accountant Review savings plan (10%)Update assets and liabilities list, arrange mortgage finance approval Complete a debt review/restructure – meet with financial planner Investigate purchasing an investment property Review Will, Personal, Income protection & Business Insurance

## Harcourts

Fitness & health	My goal weight is	
nearth	My exercise plan is	
	Start a 'stop smoking programme'	
	Schedule physical check-up with Doctor	
	Partner with someone to walk/jog/run exercise to hold me accountable	
	Stop eating sugar	
Personal & skill development	Prepare a list of skills I want to develop (public speaking, prospecting, presenting, phone, negotiation, closing, handling objections, IT, marketing, eBusiness, websites, PR, personal promotion, Social Media)	
	Review Academy training schedule and register for courses	
	Read one non-fiction book this quarter (read 10 pages / night)	
	Watch a video from the Harcourts One Library	
	Review Harcourts Apps	
	Practice my scripts, dialogues and role plays	
	Register for Conference	
	Engage a coach or mentor, meet with Manager or successful S/C one-on-one	
	Get an accountability partner	
	Listen to a podcast a week	

the academy