

Accountability Checklist 2018

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

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

