

Five Steps to Better Organization and Time Management Workbook



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The best you can bring to your life and the world is to boldly pursue your goals and dreams.

Our deepest fear is not that we are inadequate.

Our deepest fear is that we are powerful beyond measure.

It is our light, not our darkness, that most frightens us.

We ask ourselves, "Who am I to be brilliant, gorgeous, talented, and fabulous?"

Actually, who are you not to be?

You are a child of God.

Your playing small doesn't serve the world.

There is nothing enlightened about shrinking

so that other people won't feel insecure around you;

We were born to make manifest the glory of God that is within us.

It's not just in some of us; it's in everyone.

And as we let our own light shine,

We unconsciously give other people permission to do the same.

As we are liberated from our fear,

Our presence automatically liberates others.

*Written by Maryann Williamson
from her 1992 book "A Return to Love"*

This workbook and webinar are created in a market that is tough for many Agents. We respect those who are persistent, tenacious and committed to continuous growth and improvement in their business and in their life. We dedicate this work to you; the Agents who do more than survive. You choose to grow and succeed. You are the role models, the leaders, and the future leaders of our profession.

*With sincere gratitude,
Rich Levin*

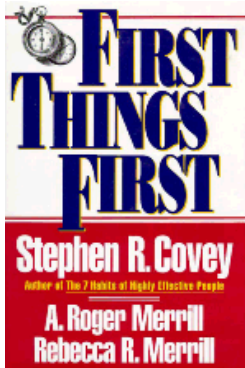
The Five Steps

1. Determine success by measurable results.
2. Schedule committed priorities directly onto your calendar.
3. Plan five minutes at the beginning of each day to pri-organize that day.
4. Schedule one hour each weekday early in the day for the important that is not urgent
5. Use the seven basic tools (They are very basic.)

Real Estate is Hard

To be good at it requires a wider range of skills than most professions.

Perhaps the most challenging of those skills is organizing and managing time and all of the tasks and priorities.



Real Estate is so challenging because there are so many important and urgent, hard to schedule activities that disrupt the day.

And there are so many important but not urgent activities that are required for growth. These are easy to schedule but also very easy to ignore.

Urgent: Harder to Schedule

- Presentations
- Response to leads
- Inspections
- Pre-closing walk-through
- Closings
- Other time sensitive activities
- Showings
- Offers

Not Urgent: Easier to Schedule - Also easy to ignore

- Prospecting and lead follow-up
- Marketing and technology
- Service to listings and pendings
- Rehearsing scripts, presentation, and other learning
- Thinking and strategizing

“Winning Ugly means achieving your goals despite imperfect organization and time management; which is the only way to win because, particularly in Real Estate there is seldom if ever perfect organization and time management.”

First Step

1. Determine success by measurable results.
 - a. Monthly Sales Goals
 - b. Weekly Initial Appointments
 - c. Income and Anticipated Income

Your History :

2006:	\$ 2380400
2007:	\$ 3542800
2008:	\$ 3954800

Goals That Motivate
(Worksheet)

	Volume	Income	Units	Total App'ts	App'ts / Week
Exceptional	\$ 9000000	\$ 189,000	36	72	1.8
Tiptoe	\$ 5000000	\$ 105,000	20	40	1
Disappointment	\$ 3500000	\$ 73,500	14	28	0.7

Based On 40 Weeks

Your Average Sale Price:

Agent Split %:

Franchise Fee %:

Co-Broke Fee %:

Buyer's Appointments to Sales: : (60%)

Success Rate: : (50%)

Seller's Appointments to Sales: : : (60%)

SALE PRICE- DOLLAR VOLUME (\$)
(By Contract Date)

Monthly

MONTHLY(\$)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
2007	0	0	0	0	0	0	0	0	0	0	0	0
2008	0	0	0	0	0	0	89,900	196,900	219,995	259,000	0	0
2009	328,900	228,900	488,900	378,000	568,000	883,700	458,500	288,400	722,000	166,000	0	0
2010	308,900	129,000	130,000	457,900	718,900	888,800	219,000	410,000	510,000	416,000	262,000	208,000
2011	457,000	298,000	329,000	530,500	620,000	0	0	0	0	0	0	0
GOAL	350000	300000	350000	500000	700000	800000	500000	400000	500000	400000	250000	250000

YEAR-TO-DATE(\$)

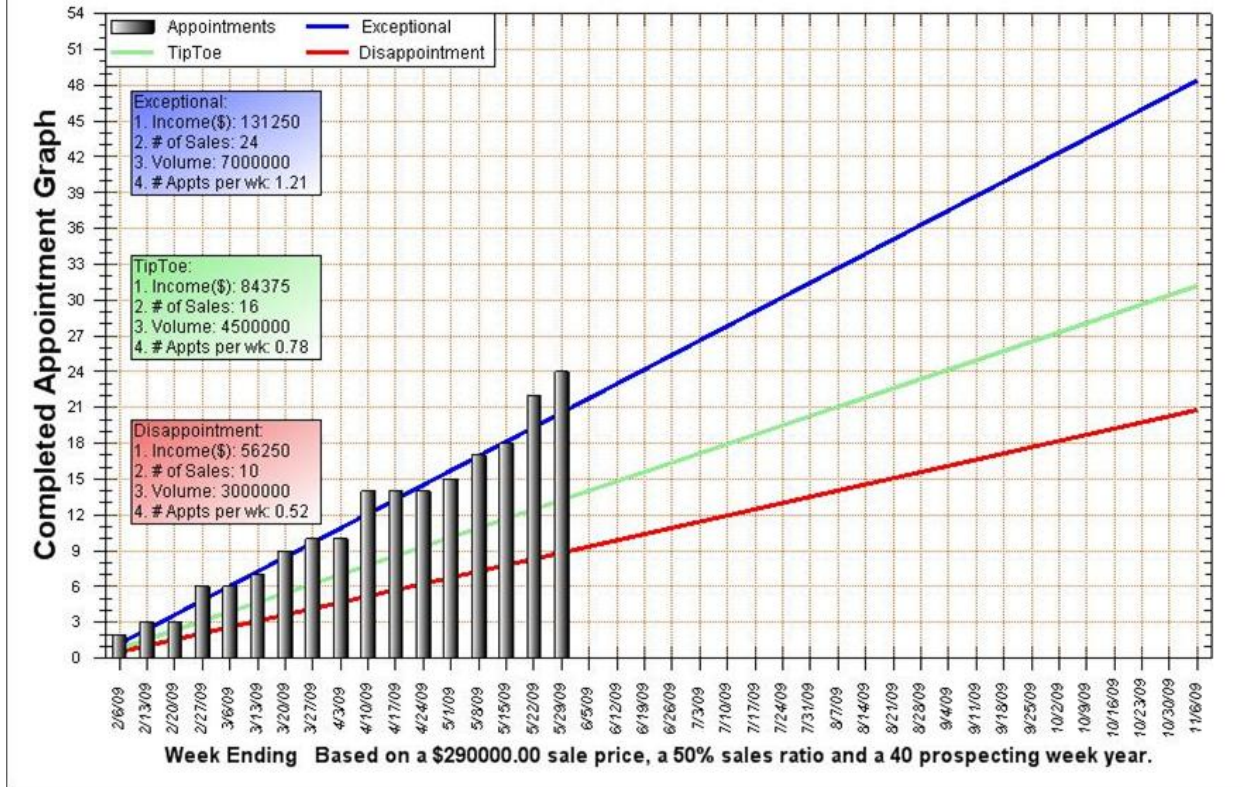
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
2007	0	0	0	0	0	0	0	0	0	0	0	0
2008	0	0	0	0	0	0	89,900	286,800	506,795	765,795	765,795	765,795
2009	328,900	557,800	1,046,700	1,424,700	1,992,700	2,876,400	3,334,900	3,623,300	4,345,300	4,511,300	4,511,300	4,511,300
2010	308,900	437,900	567,900	1,025,800	1,738,700	2,625,500	2,844,500	3,254,500	3,764,500	4,180,500	4,442,500	4,650,500
2011	457,000	755,000	1,084,000	1,614,500	2,234,500	2,234,500	2,234,500	2,234,500	2,234,500	2,234,500	2,234,500	2,234,500
GOAL	350,000	650,000	1,000,000	1,500,000	2,200,000	3,000,000	3,500,000	3,900,000	4,400,000	4,800,000	5,050,000	5,300,000

Completed Appointment Record

Weekly

Week Ending Date	Client Name	Buyer or Seller	Source of Appointment	Agent	Yes: Y No: N maybe?	If Yes Price When Sold	Edit	Delete
04/29/2011	1 Connie Porter	Buyer	Sphere of Influence referral	Rich	Yes	220,000	Edit	Delete
	2 Trevor Ariza	Seller	Expired	Rich	Yes	86,000	Edit	Delete
	3 Tom and Sue Bryant	Seller	Sphere of Influence referral	Rich	Yes	340,000	Edit	Delete
04/22/2011	1 Tony Staples	Seller	Expired	Rich	Yes	190,000	Edit	Delete
	2 Tom Landay	Seller	Sphere of Influence	Rich	Maybe	0	Edit	Delete
04/15/2011	1 Sharon Ward	Seller	Sphere of Influence	Rich	Yes	220,000	Edit	Delete
	2 Melissa and John Sterling	Seller	Sphere of Influence Past Client	Rich	Yes	220,000	Edit	Delete
04/08/2011	1 Charlie Ward	Seller	Sphere of Influence	Rich	Maybe	0	Edit	Delete
	2 Maribeth SanGregory	Buyer	Sphere of Influence referral	Rich	Yes	250,000	Edit	Delete
04/01/2011	1 Armand Vega	Seller	Sphere of Influence Past Client	Rich	Sold	165,000	Edit	Delete
	2 Henry Lissom	Buyer	Sphere of Influence referral	Rich	Yes	289,000	Edit	Delete
03/25/2011	1 Karl Marksman	Seller	Sphere of Influence	Rich	Yes	320,000	Edit	Delete
	2 Mark Twanton	Seller	Farm	Rich	Yes	279,000	Edit	Delete

Completed Appointment Graph



***“You don’t have to get it right!
Just get it going.
And keep improving it.”***

The Rule of Systems

***“Anything you do more than three times a month
needs to be systematized.”***

**With systems you can preserve energy
to focus on priorities and solutions.**

**Without systems you are always using all of your energy
just to get the work done.**

1. Determine success by measurable results.
2. Schedule committed priorities directly onto your calendar.
 - a. Time off, hours or days
 - b. Scheduled Meetings
 - c. Doctors, Dentists, etc.
 - d. Exercise, Sports, Clubs, Religion
 - e. Meals, Laundry, & Housework
 - f. Children with their Homework
 - g. What other committed priorities do you have?
3. Plan five minutes at the beginning of each day to pri-organize that day.
Prioritize and Organize = Pri-Organize

Pri-organize Your Day:

What must be done? Write it down.

When? Put it in the calendar.

What is scheduled?

What needs to be scheduled, delayed or cancelled?

What would be nice if?

What needs to be avoided?

The 4 D's of Organization and Time Management

Do it now

Delegate it (Make a note to yourself to follow up)

Delay it (Schedule it on your calendar)

Dump it



Fourth Step

1. Determine success by measurable results.
2. Schedule committed priorities directly onto your calendar.
3. Plan five minutes at the beginning of each day to pri-organize that day.
4. Schedule one hour each weekday early in the day for the important that is not urgent

Create Daily Habits

Same time – Same Day – Same Place – Same Way



Monday + – Prospect & Make appointments

Tuesday - Technology & Skill Development

Wednesday – Marketing – Web & Traditional

Thursday – Service to Clients

Friday – Review Your Plan Think & Strategize

“Your success is more dependent on your daily habits and systems than the quality of your plan or the quality of your actions.”

Fifth Step

1. Determine success by measurable results.
2. Schedule committed priorities directly onto your calendar.
3. Plan five minutes at the beginning of each day to pri-organize that day.
4. Schedule one hour each weekday early in the day for the important that is not urgent
5. Use the seven basic tools (They are very basic.)

Seven Basic Tools

1. Calendar (PDA)
2. Database (CRM)
3. File Folders (manila)
4. To-do list notebook
5. Whiteboards
6. Checklists
7. Daily habits

Folders – Manila and Digital

Create manila folders for listings and Buyers. The same folders become your pending folders once an offer is accepted.

Each time, close and put away folders.

Use your calendar to prompt your work.

File the folders in a way that works for you.

Create and use digital and e-mail folders.

Sanity and Memory – To-Do List Notebook

List your to-do tasks in the notebook.

Use it for all notes throughout the day.

Early in the day open it and your calendar.

Star or highlight the important tasks.

Cross off or check off completed ones.

Do this during your Pri-Organize 5 minutes.

Keep it with or near you at all times.

For Every Task Ask Two Basic Questions

What tools? What time?

For Leads

1. As the leads come in
2. When you speak to them
3. How you follow up so that you retain them
4. For Listing Presentation

For Listing Presentation

1. When you schedule it
2. When you are preparing
3. When you get the listing
4. When you don't get the listing

For Every Task...Ask

1. Leads
2. Listing pres.
3. Seller service
4. Buyer pres.
5. Buyer service
6. Showings, offers, inspections, etc.
7. Pending service
8. Marketing - Web, Direct Mail, other
9. Prospecting

*“When you start doing these things right
and it really begins working for you... things may go wrong.”*

*“When you create these systems and habits for what is important and urgent,
you create continuous growth and continuously increasing results.”*

*When you organize in this way you are always working on the highest
priorities. That gives you tremendous confidence and peace of mind.
It naturally and powerfully fuels your motivation, every day.”*



Cathy McWilliams
Canandaigua, New York

"After struggling for three years I was still only selling ten or so homes. I wanted to pay for college educations and balance my life so I could enjoy my family. I met Rich.

He showed me business systems and kept adding systems. In 1 year I was selling 30 homes; in 3 years, nearly 60 homes. And in 6 years I was the #1 Agent at Nothnagle REALTORS® selling 134 homes in one year.



Kyle Killibrew
Springfield, Illinois

I was doing well. Then I seemed to get stuck at 7 million and knew I needed help.

I called Rich Levin. It was apparent immediately that he was different. He really focused on my success. The next year I did over 9.5 million, then 18 million in 2009 when everyone else was struggling. (over \$20M in 2010)



Doug Doebler
Miami, New York, Caribbean

"I came to Rich with a dream to sell resort property in the Caribbean.

Rich's coaching gave me the clarity of purpose to accomplish my dream. If someone wants to THRIVE, Rich's systems make it happen.

I now work half as hard with far more than double the income, and I am living the life I love."

www.FreeCoachingWebinars.com

To help Agents implement these steps and systems into your business and to introduce you to Rich's work, Rich conducts a live 15 minute webinar every weekday at 8:45 Eastern. It is free.

Each day the recording is posted on the site above.

You can also register to get a link and listen live.

In addition to improving your organization and time management, throughout the year, Rich provides tips on every skill, system, and habit in your business.

Prospecting

Listing Presentation

Working with Buyers

Web Marketing

Sphere of Influence Marketing

Farming

Quality Service

Business Planning

Sales Skills

Communication Skills

Goal Setting

And much more

There is the opportunity for you to customize the daily coaching sessions. Rich signs on early for specific questions.

Join Rich for the most comprehensive coaching on earth at...

www.FreeCoachingWebinars.com

If you like the work and wish to coach more directly with Rich now or later, call 585-244-2700 or e-mail Rich@RichLevin.com and Rich will discuss the options with you.