

# Activities Tracker

## Your Path to Success

Check the box next to each item below when it has been completed, and ask your manager to initial each milestone. This will make it easy for you to keep track of your progress, and will help you earn incentives as you complete the milestones on your path to success.

Each section contains helpful material to assist you in accomplishing each activity; specific sections are referenced for your convenience. Your manager and onboarding trainer will guide you through the process of using this manual as your guide.

### WEEK 1 ACTIVITIES

#### With Your Office Manager

- Complete application paperwork
- Register with your local Association of Realtors; sign up for orientation.
- Sign up for the Multiple Listing Service, orientation and basic MLS training
- Post your real estate license in the office
- Log into [www.jackconway.com](http://www.jackconway.com) to explore the website and Virtual Office. Use the username and password provided.
- Register for the next session of the Conway College of Real Estate Knowledge
- Log into the Institute online campus and explore the resources available
  - o **Training & Education**
- Register for Tech Onboarding training
- Obtain a key to the office
- Tour the office to learn where supplies and files are kept; how to use the copier
- Review the policy manual
- Review current office listings and schedule time to view them

#### On Your Own

- Explore the features of the Conway email system
  - o **Technology**
- Begin compiling a database of names, addresses and email addresses of people you know; your sphere of influence
  - o **Ninja Selling**
- Review the Conway Social Media and Technology User Policies
  - o **Marketing**
- Update Facebook, LinkedIn and other social media profiles to include Conway
- Review the NAR Code of Ethics, bylaws and MLS regulations
  - o **Being a Realtor**
- Read the books *The Go-Giver* and *Go-Givers Sells More*

- Review the policy manual
  - o **Forms & Policies**
- Attend your office sales meeting
- Attend your office property tour
- Attend Realtor orientation at your local Association
- Log into [www.realtor.org](http://www.realtor.org) to explore resources and benefits available to you through membership in NAR.
- Visit all Conway listings in your area in order to know the inventory and be eligible to take uptime.
- Visit area Conway offices to introduce yourself to other agents and managers
- Drive the streets to familiarize yourself with the area and neighborhoods
- Compile a “car tool box” with flashlight, tape measure, hammer/mallet, screwdriver, umbrella, mud boots, and box of light bulbs

## **WEEK 2 ACTIVITIES**

### **With Your Office Manager**

- Set long-term goal for 12-month period; dollar volume or earnings, and number of sales/listings; develop your business plan around these goals
  - o **Goal Setting**
- Discuss the office’s uptime procedures and scheduling
- Discuss telephone techniques and how to talk with customers who call the office.
- Discuss Ninja Selling and Go-Giver books; fundamentals and benefits to agent
  - o **Ninja Selling**
- Discuss marketing to a specific neighborhood/area and choose your farming territory. Discuss best first-contact strategy with people who live in that area.
- Review the offer to purchase, the listing agreement, the affiliated business arrangement disclosure, agency disclosure
  - o **Forms & Policies**
- Schedule meeting with your office’s mortgage consultant to discuss financing options and programs available to borrowers

### **On Your Own**

- Attend Tech Onboarding Session
- Log into ToolKit CMA and become familiar with the options for buyers and sellers
  - o **Training & Education**
- Create a practice market analysis on your house or a friend’s house
- Prepare a practice offer to purchase using your own information or a friend’s
- Prepare a practice listing agreement and role-play the presentation to the owner
- Review the agency disclosure and affiliated business arrangement forms
- Log onto Institute for webinar: “Steve Harney’s Pricing Properties”

- Attend an open house with another associate
- Attend a home inspection with another associate
- Mail 20 “new agent” letters/personal notes to people in your database
- Edit your biography on your Conway profile page; upload your agent photo
  - o **Training & Education**
- Visit [www.ninjaselling.com](http://www.ninjaselling.com) to watch the video “The History of Ninja Selling”
- Shadow an uptime agent in the office and learn telephone procedures
- Continue working on your database
- Attend office meeting and tour
- Familiarize yourself with your chosen farm territory and start compiling information about residents and properties in that area. Plan your first marketing project for your farm.

### WEEK 3 ACTIVITIES

#### With Your Manager

- Discuss For-Sale-By-Owner and expired listing techniques
- Set short-term goals for:
  - o **Getting a listing appointment**
  - o **Showing a property to a potential buyer**
  - o **Obtaining an offer**
  - o **Generating a relocation referral**
- Review your practice offer to purchase, listing agreement and market analysis
- Review referral opportunities through the company (incoming and outgoing relocation, affinity, Military on the Move, senior specialists, Referral Registry)
  - o **Relocation & Referrals**
- Review affiliated services (mortgage, insurance, home warranty, move management)
  - o **Affiliated Services**
- Discuss MLS features, reports, rules and regulations for listings

#### On Your Own

- Plan to do an open house for another associate’s listing
- Send 20 new-agent letters/personal notes to people in your database
- Mail 10 letters of introduction to residents in your farm territory
- Become familiar with Xpressdocs to create postcards and fliers
  - o **Training & Education**
- Contact the FSBOs and expirers in your market area
- Explore MLS system; attend MLS training at local Realtor Association
- Meet with your office’s loan officer to review mortgage process, programs offered and general qualifying guidelines

- Log onto Institute for webinar: “Profitable Buyer Representation”
- Shadow an uptime agent and refine telephone techniques
- Continue expanding your database
- Attend office meeting and tour; visit the office’s new listings
- Attend MLS training class

## WEEK 4 ACTIVITIES

### With Your Manager

- Review your open house results
- Review your FSBO results
- Review your expireds results
- Review the listings and sales folders and how to use Skyslope
  - o **Training & Education**
- Review real estate pricing strategies
- Discuss uptime observations, review telephone techniques, and schedule next uptime shift
- Review online real estate websites (Realtor.com, Zillow, and Trulia)
  - o **Training & Education**

### On Your Own

- Meet with your office’s mortgage consultant to discuss qualifying guidelines, types of financing programs, new regulations
  - o **Affiliated Services**
- Mail 20 new-agent letters/personal notes to people in your database
- Send 10 letters of introduction to your farm territory
- Contact 10 people in your farm territory (the 10 you sent letters to the previous week)
- Contact the FSBOs and expireds in your market area
- Check your automobile for cleanliness and customer comfort
- Practice your listing consultation system with a family member, friend or another sales associate
- Create a practice listing folder and buying folder in SkySlope
- Register for the next Relocation, MOM and Senior training programs
  - o **Relocation & Referrals**
- Do uptime
- Log onto Institute for webinar: “Matthew Ferrara’s Six Ways to Improve Listing Presentations”

## WEEK 5 ACTIVITIES

### With Your Manager

- Review the short term goals set in Week 3 and chart your progress toward the long term goals you set in Week 2. Discuss and make adjustments and changes as desired/required.
- Review your database, your contact with people in the database and leads
- Review Ninja Selling principles of mindset, skill set and actions, including the specifics of the Ninja Nine as they relate to your business plan. Outline your plan to work “on” your business and “in” your business
  - o **Ninja Selling**
- Plan to do an open house within the next week
- Review the market analysis and role-play a presentation
- Review the purchase and sale agreement
- Review your uptime results
- Discuss techniques for writing effective ads, print media and MLS descriptions

### On Your Own

- Mail 20 new-agent letters/personal notes to people in your database
- Send 10 letters of introduction to your farm territory
- Contact 10 people in your farm territory (the 10 you sent letters to the previous week)
- Create a Hot List and a Warm List; make calls to prospects on each list
  - o **Ninja Selling**
- Have 50 conversations about real estate this week
- Schedule two real estate reviews for the following week with people in your database in order to practice your skills and show others how you can help them
- Develop a plan for sending something of value to your entire database list at least six times during the next year.
- Continue to add people to your database
- Write five ads and property descriptions for listings in your office
- Attend office meeting and tour
- Do uptime
- Log onto Institute for webinar: “Developing Personal Referrals: A Cornerstone of Your Business Plan”

## WEEK 6 ACTIVITIES

### With Your Manager

- Review your Monday Morning Agenda, your Ninja Nine plan, and your systems and routines; make adjustments as necessary
  - o **Ninja Selling**
- Review the ads and property descriptions you wrote
- Review your leads
- Review the art of showing property
- Discuss the role of a real estate agent at a closing
- Review your uptime results

### On Your Own

- Continue sending new agent letters/personal notes to people in your database
- Continue to send letters of introduction and market activity to your farm territory
- Continue to contact 10 people in your farm territory
- Continue to contact FSBOs and expireds in your market area
- Have 50 real estate conversations this week
- Schedule two more real estate reviews for next week
- Create a time management plan for activities and personal/marketing efforts for the next year
- Continue to add names to your database, and edit if necessary
- Become familiar with Conway Customer Relationship Management program as a way to manage your database
  - o **Training & Education**
- Attend office meeting and tour
- Log onto Institute for webinar: "Success is Never Accidental: You've Got to Have a Plan"

## WEEK 7 ACTIVITIES

### With Your Manager

- Review all leads (buyers and sellers; FSBOs and expireds)
- Review progress with your farm territory
- Review the Ninja Nine. Are your weekly and daily activities becoming habits?
- Plan an open house for next week
- Review the effectiveness of your uptime
- Review your CMA preparation and pricing strategies
- Discuss outside activities/organizations that will provide you with opportunities to connect with people in your community
- Register/attend next Conway College of Real Estate Knowledge session

### **On Your Own**

- Create your Monday Morning Agenda for the week, and map out your plan for your daily and weekly activities
- Continue sending personal notes/letters to people in your database and your farm territory
- Have 50 real estate conversations
- Attend office meeting and tour
- Do uptime shift
- Join a local organization to serve your community
- Log onto Institute for webinar: “Matthew Ferrara’s Handling Objections”

## **WEEK 8 ACTIVITIES**

### **With Your Manager**

- Review your activities and results during the past 60 days
- Review your short-term and long-term goals
- Plan to attend educational programs offered by the Realtor Association
- Discuss the need for additional training; areas where you need focus
- Review real estate issues you have learned about since launched your career

### **On Your Own**

- Prepare your Ninja Monday Morning Agenda; the Ninja Nine daily and weekly activities
- Attend educational programs as they make themselves available
- Attend office meeting and tour
- Do uptime
- Log onto Institute for webinar: “How to Be More Productive and Less Busy”

## Activities Tracker Your Path to Success

### MILESTONE CHECKLIST

By completing the activities in this manual, you are able to earn as you learn!  
As your manager verifies that these milestones have been achieved, you will earn rewards  
designed to help you advance your real estate career.

**Week 1      100 New Agent Postcards through XpressDocs**

Agent initial \_\_\_\_\_      Manager initial \_\_\_\_\_      Date \_\_\_\_\_

**Week 2      Set of 50 Personalized Notecards**

Agent initial \_\_\_\_\_      Manager initial \_\_\_\_\_      Date \_\_\_\_\_

**Week 3      \$50 Credit for XpressDocs Marketing Activity of Your Choice**

Agent initial \_\_\_\_\_      Manager initial \_\_\_\_\_      Date \_\_\_\_\_

**Week 4      Additional 500 Photo Business Cards**

Agent initial \_\_\_\_\_      Manager initial \_\_\_\_\_      Date \_\_\_\_\_

**Week 5      Complimentary Certificate Course on Institute**

Agent initial \_\_\_\_\_      Manager initial \_\_\_\_\_      Date \_\_\_\_\_

**Week 6      Complimentary Just Listed/Just Sold Cards**

Agent initial \_\_\_\_\_      Manager initial \_\_\_\_\_      Date \_\_\_\_\_

**Week 7      Complimentary Admission to Conway Convention**

Agent initial \_\_\_\_\_      Manager initial \_\_\_\_\_      Date \_\_\_\_\_

**Week 8      \$100 Discount on Ninja Selling Installation Tuition**

Agent initial \_\_\_\_\_      Manager initial \_\_\_\_\_      Date \_\_\_\_\_

As each incentive is earned, send this form to Agent Services Department to claim your rewards.