

Week 6

Welcome to week 6! This week, you are going to create more room in your life for success by simply getting organized. Many people cringe at the thought of diving in to their long-established messes. The piles are too deep or the habit of disorganization is too hard to break. Have faith and remember to enjoy the process of this coaching program. Every assignment is designed to take you where you want to be.

- Increase Database By 5
- Realtor to Lunch
- [Prequal Tracking Form](#)
- 5 Phone Calls to Database
- 4 D's of Organization – Desk, Files and Piles
- _____

Use this space for other goals you want to accomplish

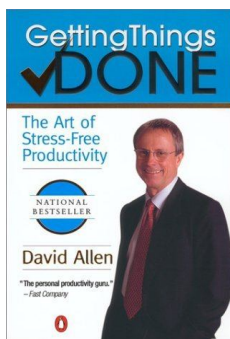
Bonus Homework Assignment

This week watch [Pursuit of Happyness](#) with Will Smith. Even if you have seen this movie before, you will be inspired for your business by watching it again. My favorite part is when he is making phone calls and realizes that if he doesn't hang the receiver down, but pushes the button to start another call he can get in six more calls. What can you do to amp up your selling? This is also a great movie if you are feeling that you have obstacles or that being in sales is too hard. ENJOY!

Tips and Tools

- Weekly Tracking Form
- Realtor Contact Form
- 5 Weekly Calls to Database
- Review Goals Sheet
- Weekly Call to Realtors

Book recommendation:



[Getting Things Done](#) by David Allen. This book is for anyone that wants to get through the day with less stress and more productivity.

Increase Database by 5

This was an assignment on week four—refer back for specifics. I will be making this assignment randomly throughout your coaching program, as you should always be looking to get to know more people and expand your sphere of influence.

Take a look at what all you will be doing this week and find opportunities to introduce yourself to someone new. Offer to send them the “What is Your Name Worth Free Report” from week 3. Next time you go to a meeting, OF ANY KIND, look around and sit next to someone you don’t know or don’t know well. We all get stuck in ruts and stay in our comfort zone. That’s great...if you are happy with your production and not worried about next month or next year.

Take a risk and meet someone new. You may just find your new best friend.

Realtor to Lunch

Again, you have an assignment to take a Realtor to lunch. This is a great habit to get into. Often, a meal together can move a relationship from business to friendship. In [Little Black Book of Connections](#), Jeffrey Gitomer says, *“All things being equal, people want to do business with their friends. All things being not quite so equal, people STILL want to do business with their friends.”*

If you are comfortable, invite a Realtor to bring another agent in their office. Explain that you would love for them to bring someone that could benefit from the way you work with buyers and help their business. If you have an agent willing to do this, they most likely will sing your praises. Priceless!

You may even want to invite their assistant to lunch once in a while. Creating strong relationships also encompasses the people that are important to their business. Ask questions about them personally as well as professionally.” *What can I do to make your job easier?”* is always a great question to ask.

Prequal Tracking Form

The point of this assignment is to make sure you are utilizing some form to track prospects. Here is one [sample tracking form](#) if you want something simple to maintain on your own. I feel that anyone who you speak with regarding a mortgage needs to be tracked and marketed to, not just those that you pulled credit on. (See week 4 Prequal System for ideas)

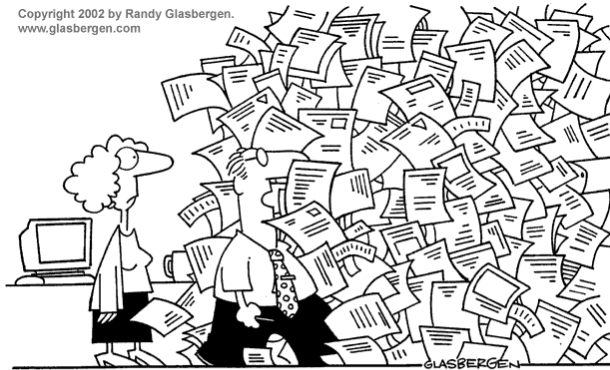
This form can be modified to fit your needs. The most important thing is to gather the necessary information to add them to your database and make sure follow up contacts happen. Update and review this form often looking for opportunities.

5 Phone Calls to Database

This will be the last week this is a specific assignment. You will continue to see it in the Tips and Tools section. Continually look for reasons to call your borrowers. If they have an ARM or any type of loan that needs attention, be a resource and keep them updated on interest rates and opportunities.

4 D's of Organization Your desk, files and piles are all getting worked on this week. This assignment is also a quick fix if you feel stuck in a marketing rut or business is sagging down where it starts to make you concerned as it creates momentum. Creating momentum with organization is one of the best ways to pull yourself up and out. When you are organized, you become more creative, feel in control of your life and are able to get more done.

To get started, schedule some quiet time (early morning, evening or weekend) in the office going through **everything**. Files, magazines, loose papers, drawers, etc. The first time is going to be your toughest. You probably have stacks of information that have been accumulating for years. Here are a few tips on how to dig in and get it done.



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"I have some paperwork to catch up. If I'm not back in two days, organize a search and rescue team!"

Do it. If you can take immediate action and finish the task, do it. Keeping a pile of little "to-do's" will drain your energy and keep you from being as productive as possible.

Dump it. This is easy for me. When we recently moved, my husband told my children to stay out of my way or they might get sent to Goodwill. But I do realize that many people struggle with throwing things out. You're going to have to trust me on this one - You will feel better if you reduce the amount of "stuff" in your office. If you haven't looked at it in some time, chances are you won't need it. You can also find virtually anything you need on the Internet. Fill up the garbage can. Then do it again, and again.

Defer it. Some things need action but are waiting on other steps to happen or it must be done on a certain day. Calendar the task and file the notes/papers in a pending file. If you have the action on a specific day/time in your calendar, your mind will be able to stop worrying about what needs to get done until it is actually time to do it.

Delegate it. There are many things that others can handle for you—let them. Utilize those around you to help you get and stay organized. Highly efficient people understand and consistently use others to get more done.

Once you do the initial purge of your office, maintaining is quite simple. This same process will apply to everything that is incoming: mail, e-mails, memos, anything that passes through or lands on your desk. The goal is to touch each thing only once—twice is maximum. Your ability to make this a habit will do more to increase your productivity than anything else. Do it, dump it, defer it or delegate. Just get it done!

“For entrepreneurs, ignorance is not bliss. It’s fatal. It’s costly. And it’s for losers. You either get organized, or get crushed.” - Donald J. Trump