

ODYSSEY

REAL ESTATE SERVICES LLC

ACTION PLANNER
AND SUCCESS MANAGER

CREATE YOUR STORY

Imagine your career as a captivating story, each chapter brimming with achievements and milestones. With this Action Planner, you hold the pen to your life's narrative, crafting each chapter with intention and purpose, strategically paving the way to a successful and fulfilling journey.

This planner is a also a comprehensive life journal crafted to help you masterfully organize tasks, manage time with precision, define clear goals, build empowering habits, and unleash your creative expression. Through thoughtful reflection, you'll review measurable results, refine your activities, and hold yourself accountable to achieving your aspirations.

······ KEYS TO SUCCESS ··

To be successful in real estate it takes specific characteristics, including:

- Consistency
- Accountability
- Persistence
- Adaptability
- Coachability
- Time Management
- Goal Setting
- Integrity
- Resilience
- Attitude of Gratitude
- Patience
- Strong Work Ethic
- Focus
- Self-Discipline
- Kindness
- Passion
- Organization

ONE OF THE MOST IMPORTANT KEYS TO SUCCESS IS HAVING THE DISCIPLINE TO DO WHAT YOU KNOW YOU SHOULD DO, EVEN WHEN YOU DON'T FEEL LIKE DOING IT.



HOW TO USE THIS ACTION PLANNER

O1 DETERMINE YOUR WHY

Reflect on why you entered the real estate profession. Consider what drives you to wake up each morning and perform your duties. Think about how you would spend your last 24 hours and with whom. Contemplate the legacy you wish to leave behind. These questions are essential for identifying your purpose and fostering your motivation to succeed.

O2 | CREATE A BUDGET

If you already have a household budget, that's excellent! Additionally, you will need to establish a business operating budget to manage your revenue and expenses, as these will influence your household budget and financial needs.

03 ESTABLISH INCOME GOALS

Determine the amount of income necessary not just to survive, but to thrive in your career. A common mistake among new real estate agents is the lack of clearly defined goals and an accountability partner to help maintain progress. Setting income goals involves breaking down the required activities and number of transactions to achieve your desired income level.

04 TRACK REVENUE & EXPENSES

Monitor your monthly revenue and expenses to ensure adherence to your budget. Budgets act as roadmaps, setting boundaries. Unexpected expenses or increased revenue may occasionally shift these boundaries. Conduct a monthly review of your revenue and expenses, comparing them to your budget.

O5 | CREATE A TIME BUDGET

Just as crucial as a financial budget is a time budget. Effective time management involves prioritizing the 24 hours in a day to meet life's demands efficiently. Poor time management leads to increased stress, health decline, and decreased productivity. Often, we say, "I don't have time," but in reality, we fail to budget and utilize our time wisely.

TIME-BUDGETING

Begin your time budget with time-blocking, a powerful technique for managing time effectively and boosting productivity. Time-blocking involves dividing your day into distinct blocks of time, each dedicated to a performing specific activities and tasks.

Master time-blocking with the following tips:

A COLORIZE TO PRIORITIZE

Create a color-coding system to categorize priorities, helping you organize tasks by urgency and importance. This system ensures that critical tasks are completed first while less urgent tasks are deferred. Typically, higher-priority activities are those that generate the most income.

RED LEVEL

TOP PRIORITY ACTIVITIES:

- Prospecting for New Clients
- Hosting Events
- Networking
- Conducting Webinars/Seminars
- Meeting w/ Clients
- Market Research
- Community Involvement

3-4 HOURS DAILY MINIMUM

YELLOW LEVEL

MID-LEVEL ACTIVITIES:

- Connecting with Past Clients and Referral Partners
- Follow-Up with Potential Leads
- SOI
- Conducting Open Houses
- Attending Seminars, Workshops, Conferences
- Taking Courses | Education
- Agent-to-Agent Interaction

30-60 MINUTES A DAY

GREEN LEVEL

LOW-LEVEL ACTIVITIES:

- CRM Updates
- Smart Campaigns
- Social Media Updates
- Administrative Tasks

30-60 MINUTES A DAY

BLUE LEVEL

DEFERRED ACTIVITIES:

 Anything that is does not need to be done at this time

30-60 MINUTES A DAY

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TIME-BLOCKING

B SET TIME-BLOCKS

Time-blocking involves designating specific periods to focus on tasks according to their priority. However, it is important to note that top-priority tasks, known as RED level tasks, are not necessarily handled first thing in the morning. For example, many networking events occur in the afternoon or evening, meaning RED level tasks may be scheduled later in the day.

Additionally, you may allocate different time blocks for various priority levels throughout the day. For instance, you might start with a 30-minute RED level task in the morning, followed by a GREEN level task, then another RED level task at lunchtime, and a YELLOW level task later on. It's rare for time-blocking to be perfectly coordinated.

Many agents use highlighters to color-code their tasks or time blocks to correspond with their priority levels, such as pink for RED level tasks, followed by other colors for subsequent levels.

Here is an example of one day's time blocking:

MONDAY - AUGUST 1

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6:00 AM - 7:00 AM | Morning Routine
7:30 AM - 8:30 AM | Breakfast Meeting with Colleague
9:00 AM - 10:00 AM | Team Meeting at the Office
10:00 AM - 12:00 PM | Prospecting | Lead Generation
12:00 PM - 12:30 PM | Lunch
12:30 PM - 1:30 PM | Follow-Up
1:30 PM - 3:00 PM | Networking
3:00 PM - 4:00 PM | Follow-Up
4:30 PM - 5:00 PM | Wrap Up
5:30 PM - 6:00 PM | Dinner with Family
6:00 PM - 8:00 PM | Family Time
8:00 PM - 9:00 PM | Evening Routine & Prep for Tomorrow
```

The blocks are general categories. Now, assign specific tasks, in the form of a checklist, to each of those categories and place them within the time blocked for those activities. Be mindful that throughout the day, unexpected tasks may arise, requiring adjustments. However, try to adhere to your time blocks as they establish boundaries for accountability and help you stay on track, minimizing distractions that could divert you from your objectives.

MOTIVATION

Understanding what motivates you to get up every morning and take action, often referred to as "your WHY," is what drives you to succeed. Your passion and purpose will hold you accountable for accomplishing what you set out to do. While we may have smaller "whys" that motivate us, they contribute to a much larger purpose.

For instance, Alice wants to lose 30 pounds she gained during pregnancy. Her initial motivation may be to get back in shape, fit into her pre-pregnancy wardrobe, and improve her appearance. Ultimately, her "big why" is to be healthy and active for her child and family.

George's motivation for getting up every day may be to earn enough income to buy the new Ferrari he has wanted since he was 17. Ultimately, ensuring his family has a roof over their heads, food on their table, and financial security is his "big why."

Your "Why" may be to achieve financial independence, take a nice vacation, make a significant donation to a favorite charity, buy a house, or move to a more desirable community. Everyone has their own "why," and determining what drives you to success will keep you motivated and accountable for actionable items that will serve as the vehicle to get you to your destination or ultimate goal.

Here's how you can create and define your "why":

1 | Reflect on Your Passions and Values

- **Identify Your Passions:** What activities or interests excite you and bring you joy?
- Align with Your Values: What core beliefs and values are important to you in your personal and professional life?

2 | Determine Your Long-Term Goals

- **Personal Goals:** Consider what you want to achieve in your personal life, such as health, family, and hobbies.
- **Professional Goals:** Outline your career aspirations and the impact you want to make in your industry.

3 | Identify Immediate Motivators

- **Short-Term Achievements:** What are the immediate goals that drive you on a daily basis?
- Daily Inspirations: What gets you excited to start your day and tackle challenges?

MOTIVATION

4 | Understand the Bigger Picture

- **Connect Short-Term and Long-Term:** How do your immediate goals contribute to your larger purpose?
- Envision Your Future: What does success look like for you in the long run?

5 | Personal Examples to Inspire You

- **Health and Wellness:** Like Alice, you may want to get back in shape to be healthy and active for your family.
- **Financial Security:** Like George, you might aim to achieve financial stability for your family's well-being.

6 | Write Down Your Why

- **Be Specific:** Clearly articulate what drives you and why it's important.
- **Keep It Visible:** Place your written "why" where you can see it daily as a reminder of your purpose.

7 | Stay Accountable and Motivated

- **Set Actionable Steps:** Break down your goals into actionable steps that you can take regularly.
- **Review and Adjust:** Periodically review your "why" and adjust it as needed to ensure it continues to align with your goals and motivations.

Example: Defining Your Why

- **Short-Term Goal:** "I want to increase my sales by 20% this quarter to provide better financial support for my family."
- Long-Term Goal: "I aim to build a successful real estate business that allows me to achieve financial independence and give back to my community."

Creating your "why" will not only keep you motivated but also hold you accountable to actionable items that will serve as the vehicle to reach your ultimate goals.



MY WHY

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VISION BOARD

A vision board is a visual tool used to help individuals clarify, concentrate, and maintain focus on specific life goals. It is typically a collage of images, pictures, and affirmations of one's dreams and desires, designed to serve as a source of inspiration and motivation.

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MONTHLY FINANCIAL BUDGET

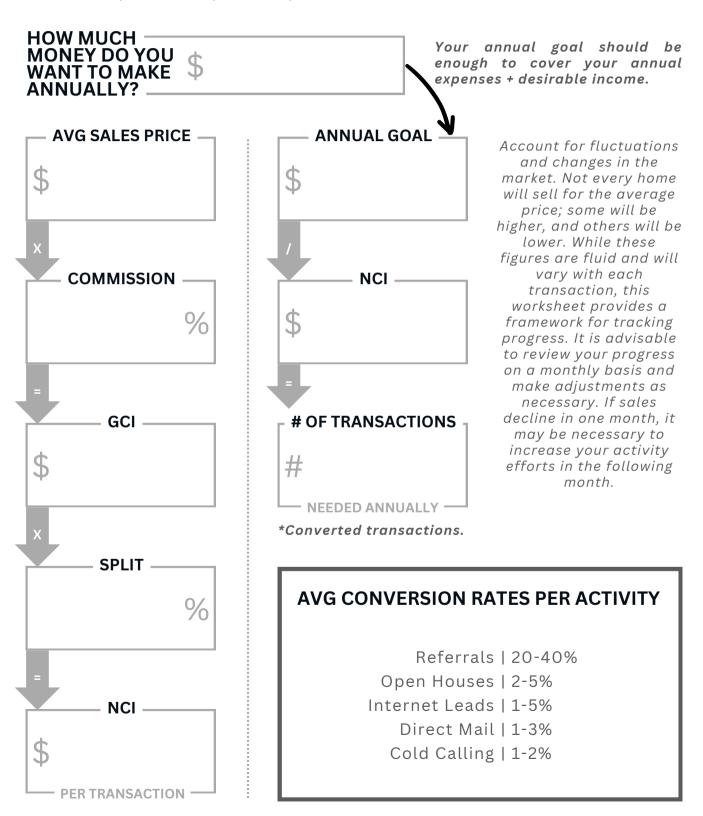
SOURCE:	AMOUNT:	FREQUENCY:
Salary 1	\$	
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Salary 3	\$	
Bonuses Commissions	\$	_
Self-Employment Income	\$	
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Dividend Income	\$	
Interest Income	\$	
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Child Support	\$	
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	— NOTES —	

MONTHLY FINANCIAL BUDGET

SOURCE:	AMOUNT:	DUE DATE:
Mortgage Rent	\$	
HOA Dues	\$	
Repairs Maintenance	\$	
Electricity	\$	
Gas	\$	
Water	\$	
Trash	\$	
Television Cable Streaming	\$	
Internet	\$	
Security System	\$	
Pest Control	\$	
Pool Service	\$	
Landscaping Service	\$	
Groceries Food	\$	
Car Payment A	\$	
Car Payment B	\$	
Auto Insurance	\$	
Auto Repairs	\$	
Clothing	\$	
Health Insurance	\$	
Prescriptions	\$	
Membership Dues	\$	
Child Care	\$	
Education Expenses	\$	
Entertainment Recreation	\$	
Charitable Contributions	\$	
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PATHWAY TO PROFITS

Based on your budget, establish your income goal. This goal should not be limited to merely covering your expenses but should adhere to the SMART criteria: Specific, Measurable, Achievable, Relevant, and Time-Bound.



2025

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SATURDAY			
FRIDAY			
THURSDAY			
WEDNESDAY			
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MONDAY			
SUNDAY			

MONTH

SOCIAL MEDIA PLANNER

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MONTHLY PLANNER

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DAILY ACTION PLAN

DAY	DATE	TODAY'S GOAL
TODAY'S INSPIRATION		
TODAY'S GRATITUDE		TODAY'S TAKEAWAY
	TODAY'S SCHEDULE	<u> </u>
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DAILY ACTION PLAN

RED LEVEL TASKS		— YELLOW LEVEL TASKS
GREEN LEVEL TASKS —	0	— BLUE LEVEL TASKS
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WEEKLY REVIEW

MONTH	WEEK
TOTAL CONTACTS MADE	MAJOR ACHIEVEMENTS THIS WEEK
TOTAL NEW LEADS	
TOTAL APPOINTMENTS	MAJOR CHALLENGES THIS WEEK
TOTAL LISTINGS	
TOTAL BUYERS	LESSONS LEARNED THIS WEEK
TOTAL PENDING	
TOTAL CLOSINGS	THINGS I AM GRATEFUL FOR THIS WEEK

MONTHLY REVIEW

MONTH	
TOTAL CONTACTS MADE	MAJOR ACHIEVEMENTS THIS MONTH
TOTAL NEW LEADS	
TOTAL APPOINTMENTS	WHAT WORKED THIS MONTH
TOTAL LISTINGS	
TOTAL BUYERS	WHAT DIDN'T WORK THIS MONTH
TOTAL PENDING	
TOTAL CLOSINGS	THINGS I AM GRATEFUL FOR THIS MONTH
:	
TOTAL COMMISSIONS	

HEALTHY HABITS

	WEEKLY MEAL PLAN		WATER INTAKE	EXERCISE
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SUPPLEMENT TRACKER

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MENTAL HEALTH HABITS

Real estate can be a stressful and overwhelming career at times. Maintaining a healthy work-life balance is critical to your success, and mental health is especially important. Here are some great tips and activities you can do to maintain a positive and productive mentality:

PRAY OR
MEDITATE

Prayer and/or meditation can help you re-center your focus on God to find peace, tranquility, and joy.

STAY ACTIVE

Exercise not only benefits our physical well-being, it can help boost our mood, reduce stress, and increase our energy.

SLEEP WELL

Create a healthy bedtime routine like taking a warm bath, avoiding caffeine after 4 PM, and taking supplements to improve sleep quality.

PRACTICE GRATITUDE

Count your blessings daily and spend more time giving thanks and showing gratitude to increase your attitude of gratitude.

AVOID NEGATIVITY

Set healthy boundaries by avoiding negativity and toxicity, including being around others who drain you emotionally.

ENJOY NATURE

Fresh air and sunshine are always a remedy for mental distress. Take a break and enjoy a few minutes taking deep breaths.

CREATE YOUR SANCTUARY

Create your sanctuary space in your home or where you feel most comfortable to "check out." Maybe it is a day at the beach or reading a book in the corner of a room where it's quiet.

GET A PET

Pets can be greatly beneficial, offering companionship and entertainment. They are forgiving, non-judgmental, and can be a great joy!

ENJOY MUSIC

Music is not only a universal language, but also a transformative healing tool. Whether you play piano, sing in a choir, or simply enjoy the latest tunes from a favorite artist, music can boost your spirits.

SEEK HELP

Don't be afraid to ask for help. Suffering in silence is not pleasant and can be detrimental to your health. See counseling or simply call a friend you trust when you are struggling with mental health.

PERFORMANCE TRACKER

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