Daily Routine SOP

Purpose

To provide a structured daily routine that maximizes productivity, maintains client relationships, and creates consistency in lead generation and business growth.

Morning Routine (7:00 AM – 9:00 AM)

- Wake up, personal prep, light exercise or mindset routine

- Review calendar and priorities for the day

- Check emails and respond to urgent items

- Review hot leads and CRM follow-ups

- Post to social media (story or scheduled post)

- Morning motivation or podcast (optional)

Lead Generation & Prospecting (9:00 AM – 11:00 AM)

- Follow up with new leads in CRM

- Reach out to past clients or sphere (calls, texts, video messages)

- Door knocking or farming (if scheduled)

- Circle prospecting or open house invites

- Log activities in CRM

Midday: Appointments & Admin (11:00 AM – 2:00 PM)

- Listing appointments, buyer showings, or virtual consults

- Client care and active file management

- Respond to offers, negotiate deals

- Coordinate with lawyers, stagers, photographers, inspectors, etc.

- Lunch break (with intention—can double as networking)

Marketing Power Hour (2:00 PM – 3:00 PM)

- Work on newsletter, social media posts, or listing write-ups

- Google Business profile updates

- Schedule upcoming content or campaigns

- Record quick video updates or market insights

Afternoon Appointments / Field Work (3:00 PM – 6:00 PM)

- Showings, listing presentations, inspections, or open house prep

- Deliver Pop Bys or drop off marketing materials

- Community involvement or visibility (school pickup, event attendance)

Evening Routine (6:00 PM – 8:00 PM)

- Dinner and family time

- Light admin if needed (email catch-up, quick tasks)

- Reflect on the day: What moved the needle?

- Plan tomorrow’s top 3 priorities

End-of-Day Wrap-Up

- Update CRM with new notes or contacts

- Confirm next-day schedule and appointments

- Set follow-up reminders

- Clear workspace and mentally shut down

Key Tips

- Time-block and treat appointments with yourself seriously

- Stay consistent—even small efforts compound

- Use a digital or physical planner to track goals and progress

- Leverage automation when possible (email drip campaigns, reminders)

Revision #2
Created 23 March 2025 23:28:13 by Eryn Richardson
Updated 23 March 2025 23:31:00 by Eryn Richardson