Monthly

Monthly Tasks Monthly Tasks are the anchor points that keep my business running smoothly and strategically. This section outlines the key actions I complete each month to stay consistent with lead generation, client communication, marketing, and personal accountability. These are the big-picture check-ins—the moments to review progress, reset goals, and prepare for what’s ahead. From updating my database and reviewing market stats to prepping content and tracking business metrics, these tasks ensure I’m working on my business, not just in it. A strong month starts with a strong plan—and these systems keep me focused, organized, and always moving forward.

- Monthly Routine

Monthly Routine

Objective

To stay organized, proactive, and growth-focused by completing key business-building tasks each month that drive consistency, accountability, and long-term success.

Timing

Complete during the first 2–3 days of each month, or set a recurring calendar event titled “Monthly Reset.”

Business Review – Review previous month’s GCI, deals closed, and lead sources. Identify new leads added, nurtures created, and pipeline opportunities. Log and analyze top-performing marketing or social content. Check budget vs. expenses (ads, marketing, systems). Update any active or pending deal tracking sheets.

Marketing & Content Planning – Plan newsletter topic and send date. Schedule or create at least 8–12 social media posts. Record a monthly market update or educational video. Update Google Business Profile with new content or photos. Refresh listing templates or marketing materials as needed.

Database & CRM Maintenance – Clean up old or inactive contacts. Add any new contacts from open houses, networking, etc. Assign follow-up tags, campaigns, or reminders. Send check-in emails or texts to past clients and warm leads. Print or prep any direct mail or Pop By items for the month.

Goal Setting & Strategy – Set 1–3 main business goals for the month. Identify one skill to improve or habit to strengthen. Review your yearly business plan or production tracker. Schedule learning or accountability check-ins if needed.