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.

Revision #1
Created 24 March 2025 13:00:29 by Eryn Richardson

Updated 24 March 2025 13:03:51 by Eryn Richardson