



**San Jacinto**  
**Properties**

Agent Training

Organizational Skills and Tools  
for Real Estate Agents

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### Company Files and Folders

Company files should be kept on the following

- Listing Agreements
- Executed Contracts (Seller)
- Executed Contracts (Buyer)
- Executed Lease Agreements (Buyer or Seller)



What goes in each file?

- 1) A copy of the contract/agreement
- 2) Contact information for the client, the other agent, the Title Company and the lender
- 3) Copies of all addenda, the survey, insurance information, floorplans, disclosures, MLS sheet, etc.
- 4) After closing, a legal sized, signed copy of the CD and copies of the commission checks, Transaction Fee checks, Commission Disbursement forms (if applicable) and Referral Fee forms (if applicable)

**The TAB of the folder should have the PROPERTY ADDRESS, Zip Code and your initials indicating that YOU represented the client.**

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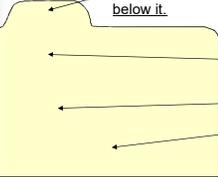
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## Personal Files and Folders

Like the company folders, your folders should contain the same information so that you have the documents, names and contacts you need. Also keep hard copies of faxes and emails that you sent.

On the tab of the folder, write the name of the client and the address below it.



On the outside of the folder, write the home, cell and work numbers for the client as well as the email. Also add the contact info for the lender, co-op agent, title company and any other contacts that may be needed.

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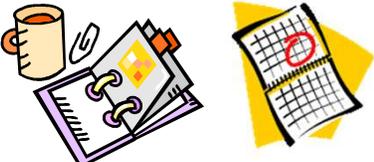
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## Using Calendars / Planners

You should purchase a calendar that is easy and convenient for you to use. It doesn't matter if it is a giant wall calendar that you write on, a dry erase calendar, or a small pocket calendar/planner. Pick one that you will use every day.

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## Using Calendars / Planners continued

### Why use a calendar / planner?

Unless you have a photographic memory, you cannot remember every appointment and event that you have. Using a monthly and weekly calendar/planner allows you to organize your appointments and make notes

WHO, WHAT, WHERE, WHEN, WHY

**This is also a good place to keep track of your vehicle mileage too.** The title companies give us new calendars each year to use for this purpose.



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## Using CRM's & Cell Phones

If you are using your cell phone, it is very easy to add contact info, dates, reminders, appointments, etc. to your phone. It's like having a portable computer, calendar and phone with you at all times.

- 1) Add client contact information to your cell phone so that you have it with you even if you don't have your files with you.
- 2) Use the built in calendars and reminders on your phone to schedule appointments and beep at you to remind you of the appointments
- 3) Pre-program the numbers of your favorite title companies, lenders and home inspectors in your phone
- 4) Use the email and text message features to contact clients if necessary
- 5) Use the camera on your cell phone to take photos of a property in emergency situations or to email to a client about a property they may be interested in
- 6) Subscribe to CRM's to manage your client database information



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## Computers and Software



There are many software products on the market aimed at real estate agents and helping them to more organized and productive. The most popular one is called TOP PRODUCER. It is quite expensive but some agents say it is awesome and swear by it.

Three programs that are available to you for free that will assist you in much the same way are MATRIX on HAR, ZIPFORMS on TAR, and SUPRA Kimweb on HAR. HAR offers regular training classes on TEMPO that show you how to create client databases, have home searches automatically forwarded to clients, set up custom searches, run customized CMA's, etc.

ShowingTime also offers a great organizational tool for agents by not only handling all of the appointments on listings, but also sending feedback requests automatically to showing agents too. It also has a feature that allows the seller to access the file directly from their own computer.

Anytime that you can use technology / software to do something automatically for you that is a great organizational benefit as well as a time saver. Remember, in real estate, time is money. If you waste your time, you are wasting your money and your opportunities.

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## Goal Setting



### Failing to plan is planning to fail

*Organization is important but without vision and goals, you will be organized and broke. You need to set daily, weekly, monthly and yearly goals. Here are some examples:*

**Daily Goals:** Today I will.... send postcards to 100 homes OR drive the neighborhoods for 1 hour looking for FSBO's OR Send letters to 20 people that I have sold to or have contacted in the past about buying or selling OR volunteer at a school or community event wearing my San Jac Real Estate shirt and name badge OR spend 20 minutes updating my mileage and expenses data AND check my email and voice mail frequently and respond ASAP but no later than the end of the day, etc. etc

**Weekly Goals:** This week I will.... spend an extra hour working on advertising OR talk a seller into letting me at least show them what I can do to help them sell their home OR take a class at HAR that will help me improve as an agent OR pass out flyers to everyone in a certain neighborhood OR make sure my records and files are up to date

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**San Jacinto**  
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## Goal Setting continued

**Monthly Goals:** This month I will...have at least   ?   new listings OR buyers OR I will have at least   ?   closings OR I will join the   ?   organization and start networking OR I will attend one school board or city council meeting to keep myself informed and to meet the board/council members OR increase my marketing by doing   ?  , etc

**Yearly Goals:** This year I will...close at least   ?   transactions OR obtain my   ?   certification OR finish all of my SAE/CE hours by   ?   OR make   ?   much money OR complete all of my San Jacinto Properties training classes.

*Did you know that you are 50% more likely to accomplish a goal if you simply write it down. Write them down and post them where you will see them every day.*

**Keep your daily, weekly, monthly and yearly goals where you will see them every day. Make a note at the end of each day, week, month and year about what goals you accomplished. If you do this every day your life will become less stressful, more organized and more successful. You are the only one that controls what you do with your time in real estate and how far you will go in your career. Take advantage of the tools that are available to you, organize your time and processes, and most of all believe that you will succeed by writing your goals down and following through on them.**

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