

# Weekly Activity Checklist

Week of \_\_\_\_\_

- Attended \_\_\_\_\_ Networking Events**
- Attended \_\_\_\_\_ Open Houses**
- Added \_\_\_\_\_ New Homebuyer/Refinance Leads to CRM**
- Added \_\_\_\_\_ New Partner Leads to CRM**
- Presented to \_\_\_\_\_ Realtors**
- Presented to \_\_\_\_\_ Builders**
- Presented Employee Benefit Network to \_\_\_\_\_ Employers**
- Checked in with \_\_\_\_\_ Current Clients in Pipeline**
- Made \_\_\_\_\_ Follow-Up Calls to Leads in Pipeline**
- Shared a Facebook/LinkedIn post from Colten's Page**
- Shared a personalized Facebook or social media post about a tip, event, open house, market news or updates, recent closing, builder/realtor partner**
- Recorded & shared a Live video to Facebook and/or YouTube (individual or cobranded - market update, news, tips, etc.)**
- Liked, Commented, and Shared a post from a Partner's social media page**
- PROSPECTED FOR MORE BUSINESS:  
Reached out to current/past clients, friends, family, and partners to request referrals AND reviews on Google, Facebook, Zillow, Yelp**

## Current Pipeline Summary (numbers for this week)

\_\_\_\_\_ Leads    \_\_\_\_\_ Applicants    \_\_\_\_\_ Closes    \_\_\_\_\_ Reviews  
 \_\_\_\_\_ Referrals    \_\_\_\_\_ Partners    \$\_\_\_\_\_ Commission

## Year-To-Date Summary (total numbers so far for this year)

\_\_\_\_\_ Leads    \_\_\_\_\_ Applicants    \_\_\_\_\_ Closes    \_\_\_\_\_ Reviews  
 \_\_\_\_\_ Referrals    \_\_\_\_\_ Partners    \$\_\_\_\_\_ Commission