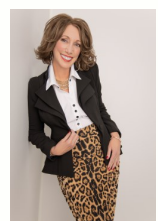


THE ORGANIZED REALTOR®!

SYSTEMS & STRATEGIES TO SHAPE YOUR BUSINESS



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Organizing My Mobile Office



Contents:

- Buyer Packets (all documents for writing an offer to purchase)
- Seller Packets (all documents for listing a property)
- FSBO Packet (with RF-161 Agreement To Show Property; individualized promotional materials, information on CBW pertaining to seller services)
- Maps (get these from your office manager & have on hand to distribute to your Buyer clients as you work in surrounding counties)
- Business Cards
- Pliers
- Flashlight
- Other tools, accessories, as needed.

Always keep a supply of the most current homes magazines to distribute to potential clients. These fit nicely in the side pockets of most car doors.

Create Your Filing System

What you need to purchase:

1. 1 box of manila file folders (letter size)
2. 1 box of hanging files (Penda-flex brand)
3. Cardboard storage file box (banker's box)

Label your manila file folders according to these categories and begin now to create what will become your basic files.

- ◆ Buyers (Ideas, Strategies, Prospecting)
- ◆ Sellers (Listing Packets, Home Enhancement Guide, Pre-listing Interview, Listing Presentation, Pricing, Square Footage)
- ◆ Contracts (Transaction Desk, Authentisign, etc.)
- ◆ Open Houses
- ◆ Personal Marketing (Social Media)
- ◆ Safety & Awareness
- ◆ Websites & Tools (Paradym, Toolkit, Moxi Presents, CBdesk, Zap, etc.)
- ◆ Home Warranty (2-10 Homebuyers Warranty)
- ◆ Showing Service (Showing Time)
- ◆ MLS (searches & functions, Courthouse Retrieval Systems, etc.)
- ◆ Daily Activities (Organizing Strategies, FORD, Safety, Referrals & Business Building, Sphere Of Influence "SOI")
- ◆ CBW Services (Property Management, CMG Financial, Referral Connections, Melrose Title, Media, Commercial Division)
- ◆ Taxes
- ◆ Continuing Education (*classes for credit and non-credit*)

Create A Tax File

Purchase a 13-pocket file to use for organizing the documents, receipts, etc., you will need for filing your taxes. These are the main categories you will use in your real estate career:

- ◆ Advertising & Marketing (*includes postage, promotional items*)
- ◆ Continuing Education
- ◆ Depreciation
- ◆ Meals (*when, where, how much, who met with, what was business purpose*)
- ◆ Office Expenses
- ◆ Referral & Closing Gifts (*receipt showing purchase of \$25 individual gift cards*)
- ◆ Supplies
- ◆ Taxes, Licenses, Fees
- ◆ Telephone
- ◆ Travel & Lodging (*visit out-of-town CB offices, exchange business cards and take photos when traveling*)
- ◆ Vehicle Expenses (*mileage .50+ per mile*)

Remember, most auditors are accountants, and tidiness makes them happy. If audited, you will be rewarded for your good behavior in keeping your records neat and orderly

Creating Your Database

| FirstName | LastName | Street | City | State | Zip | HomePhone | Source | 1st Qtr Mailing |
|-------------|----------|------------------|-----------|-------|-------|--------------|-----------------|--------------------------|
| John & Jane | Seller | 123 Apple Street | Knoxville | TN | 37901 | 865-555-1234 | Repeat Business | Postcard, Happy New Year |
| Bill & Mary | Buyer | 456 Peach Street | Knoxville | TN | 37902 | 865-555-5678 | Tennis Team | Postcard, Happy New Year |

Creating your database in an Excel Spreadsheet allows you to create your own column headings, and customized sorting by last name, zip codes, referral source, etc.
Excel seems to be universally accepted for importing into online databases, and is easily emailed to our Media Department for your own periodic mailings.

Organize Your Buyers

To purchase:

1. CBW Presentation Binder (2-pockets)
2. Real Estate Listing Folder and/or manila folder for your buyer

Label your manila file folder for your Buyer. After a contract is established, transfer to a Real Estate Listing folder.

Forms to keep you organized:

- ◆ Home Buyer Checklist *
- ◆ Rural/Metro Fire Department Brochure
- ◆ Buyers Contract to Closing Checklist
- ◆ Home Inspection Checklist
- ◆ Utility Providers
- ◆ Preparing For Closing *
- ◆ Buyer's Final Inspection Checklist *
- ◆ Commission Worksheet
- ◆ Closing Checklist

For your Buyer

- ◆ Testimonial Brochure
- ◆ Why Use A Realtor *
- ◆ Resume *
- ◆ CBW Poster with your picture OR "I Can Show You Any House"
- ◆ What NOT to do when buying a home *
- ◆ Reasons to buy in East Tennessee *
- ◆ Knox County Schools *
- ◆ CB Homebuying Basics Booklet

* ~ Samples are included in your handouts [Selling Packet: Inserts for Buyer Clients](#)

Organize Your Sellers

To purchase:

1. CBW Presentation Binder (2-pockets)
2. Real Estate Listing Folder and/or manila folder for your Seller

Label your manila file folder for your Customer. After a contract is established, transfer to a Real Estate Listing folder.

Forms to keep you organized:

- ◆ Competing Properties
- ◆ Pre-listing termite inspection
- ◆ Seller Listing to Offer Acceptance *
- ◆ Seller Contract to Closing checklist
- ◆ Preparing for the Inspections
- ◆ Preparing for the Appraiser
- ◆ Commission Worksheet
- ◆ Closing Checklist
- ◆ Seller After Closing Checklist

For your Seller:

- ◆ Testimonial Brochure
- ◆ Open House Tips
- ◆ Why Use A Realtor *
- ◆ Resume *
- ◆ Curb Appeal *
- ◆ PODS flyer *
- ◆ Things I Need From You *
- ◆ Utility Records *
- ◆ My Favorite Things *
- ◆ Seller's Personal Profile *
- ◆ Just Listed... Now What? *
- ◆ Showing Tips *
- ◆ Websites to View Property *
- ◆ Electronic Keybox *
- ◆ Marketing Plan of Action *
- ◆ Seller Proceeds Worksheet

* ~ Samples are included in your handouts
Listing Packet: Inserts For Seller Clients (Initial Interview)

The Organized REALTOR®!

ANNE'S Recommended Reading List

1. [Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones](#) by James Clear
2. [The Power of When](#) by Michael Breuss, PhD
3. [Unique Ability: Creating the Life You Want](#) by Catherine Nomura and Julia Walter
4. [The Way They Learn](#) by Cynthia Tobias
5. [The Way We Work](#) by Cynthia Tobias
6. [Taming the Paper Tiger at Home](#) by Barbara Hemphill
7. [The Greatest Salesman in the World](#) by Og Mandingo
8. [Everyone Needs a Coach in Life](#) by Micheal Burt
9. [Finish: Give Yourself the Gift of Done](#) by Jon Acuff
10. [Drive: The Surprising Truth About What Motivates Us](#) by Daniel Pink

For more about these book and others, check out my Pinterest Board at:

www.Pinterest.com/AnneWilliamsRealtor

> Anne's Booklist to Organize, Motivate, & Inspire

> Launching Your Career



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