

60 Day Action Plan

Days 1 to 30: Build the
habits

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Four weeks of daily habits and weekly actions to build your pipeline.

HOW THIS WORKBOOK WORKS

Start here	Read why this plan works and see your Buy Your Life Back roadmap.
Daily Tasks	Seven habits to tick off every weekday for all four weeks.
Weeks 1 to 4	One theme per week: Foundation, Visibility, Referrals, then Conversion and Systems.
Scorecard	Five minutes every Friday to track your conversations and what worked.

MUST DO'S FOR EVERY REACH-OUT

- ✓ Log every call, text or email in your CRM. Don't rely on memory.
- ✓ Tag every lead with their status (hot, warm, lukewarm, etc.)
- ✓ Update notes with what you discussed, their timeline or motivation, and the next follow-up date
- ✓ Check your Top 25 list daily and prioritize those contacts
- ✓ Use reminders or tasks to stay organized

Why This Plan Works

Most agents don't lack effort. They lack consistency. This plan makes the right actions automatic, one week at a time.

THE PSYCHOLOGY BEHIND IT

Habits first	Small actions done every weekday beat big bursts of effort. Consistency is what builds a pipeline.
Front-load it	Real estate pays on a delay. This month's conversations become the deals you close in the months ahead, so the effort comes first.
Be seen, give first	People refer the agent they see and hear from. Show up on video and at open houses, and comment on their posts before you post your own.
Track it	Commissions take time. Conversations don't. Your Friday scorecard shows progress long before the paycheck does.

YOUR FOUR WEEKLY THEMES

1 WEEK	Foundation Set up your Top 25, sharpen your scripts and introduce yourself on video.
2 WEEK	Visibility Get in front of people with content, market updates and your community.
3 WEEK	Referrals Build the relationships that send you business: agents, inspectors and handwritten notes.
4 WEEK	Conversion & Systems Follow up with every lead and set reminders so no one slips through.

Buy Your Life Back

This is a lot of work up front, on purpose. You're front-loading the effort to build the income that lets you hand things off. Automate from day one, and hand off to an admin as soon as you can afford the time.

Start now

STAGE 1



1. Build the habits

Daily prospecting, open houses and content. Automate your follow-up from day one: drips, reminders and AI take the repetitive work so your hours go to people.

Getting busy

STAGE 2



2. First hand-offs

A part-time admin takes the paperwork and the scheduling. Your automations are already running, so they walk into a system, not a mess.

Maxed out

STAGE 3



3. Delegate

A real admin or buyer's agent takes the work that doesn't need you.

The goal

STAGE 4



4. Buy your life back

You focus on relationships and appointments. Your team and systems handle the rest, and your time goes back to the people who matter.

Move to the next stage when your calendar tells you to, not when you hit a number. Automations come first because they cost the least and give you the most hours back.



Daily Tasks

YOUR ACTIVITY

Every weekday, tick a box once the task is done. Aim for a full row by the end of the month.

GOAL	TASK	Week 1	Week 2	Week 3	Week 4
		M T W T F	M T W T F	M T W T F	M T W T F
5 PEOPLE	Reach out to SOI and past clients	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐
2 POSTS	Instagram or Facebook posts	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐
5 PEOPLE	Make new connections	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐
10 TEXTS	Text active or pipeline leads	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐
10 CALLS	Call active or pipeline leads	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐
30 MIN	Scripting practice	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐
10 COMMENTS	Comment or DM on SOI posts before you post	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐

Foundation

YOUR ACTIVITY

Tick each task once it's done, and run through the open house checklist before Saturday.

6

TASKS

This week's tasks Tick as you go

- ☐ On Monday, secure an open house for Saturday, noon to 2pm
- ☐ Build your Top 25 list in your CRM
- ☐ Watch an objection handling training video
- ☐ Record a short intro video and post it to social media
- ☐ Spend 2 hours building your business (e.g. VIP Buyer Program, Seller's Package)
- ☐ Go on 3 coffee dates or outings

SAT

NOON-2PM

Open house checklist Must do's for every open house

- ☐ Prepare marketing materials and social posts
- ☐ Advertise in Facebook groups and ask friends and family to share
- ☐ Door knock 10 doors on each side of the listing and 10 across the street to invite them
- ☐ Tell neighbours you'll share the sale price once it sells. It shows what their home might be worth.
- ☐ Buy snacks and drinks
- ☐ Draw basket: a gift card of the winner's choice or a bottle of wine
- ☐ Add all attendees to your database
- ☐ Post a live video while you're there advertising the property
- ☐ Follow up with every attendee within 24 hours

Visibility

YOUR ACTIVITY

Tick each task once it's done, and run through the open house checklist before Saturday.

6

TASKS

This week's tasks Tick as you go

- ☐ On Monday, secure an open house for Saturday, noon to 2pm
- ☐ Post a personal video and a market update on social media
- ☐ Record a "3 Tips for First-Time Buyers" video and post it to social media
- ☐ Find a fun activity or event you can attend regularly (e.g. cooking class, book club)
- ☐ Spend 2 hours building your business (e.g. VIP Buyer Program, Seller's Package)
- ☐ Go on 3 coffee dates or outings

SAT

NOON-2PM

Open house checklist Must do's for every open house

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- ☐ Advertise in Facebook groups and ask friends and family to share
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- ☐ Buy snacks and drinks
- ☐ Draw basket: a gift card of the winner's choice or a bottle of wine
- ☐ Add all attendees to your database
- ☐ Follow up with every attendee within 24 hours

Referrals

YOUR ACTIVITY

Tick each task once it's done, and run through the open house checklist before Saturday.

6

TASKS

This week's tasks Tick as you go

- ☐ On Monday, secure an open house for Saturday, noon to 2pm
- ☐ Reach out to 2 busy agents and offer to help with showings. You want the practice!
- ☐ Reach out to 3 home inspectors in the area. Build a connection and ask lots of questions
- ☐ Write 5 handwritten notes to past clients or your SOI
- ☐ Spend 2 hours building your business (e.g. VIP Buyer Program, Seller's Package)
- ☐ Go on 3 coffee dates or outings

SAT

NOON-2PM

Open house checklist Must do's for every open house

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- ☐ Buy snacks and drinks
- ☐ Draw basket: a gift card of the winner's choice or a bottle of wine
- ☐ Add all attendees to your database
- ☐ Follow up with every attendee within 24 hours

Conversion & Systems

YOUR ACTIVITY

Tick each task once it's done, and run through the open house checklist before Saturday.

6

TASKS

This week's tasks Tick as you go

- ☐ On Monday, secure an open house for Saturday, noon to 2pm
- ☐ Follow up with every open house guest from this month
- ☐ Record a "Best Tips for Selling Fast" video and post it to social media
- ☐ Set CRM reminders so no lead goes 30 days without a follow-up
- ☐ Spend 2 hours building your business (e.g. VIP Buyer Program, Seller's Package)
- ☐ Go on 3 coffee dates or outings

SAT

NOON-2PM

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- ☐ Add all attendees to your database
- ☐ Follow up with every attendee within 24 hours

Weekly Scorecard

YOUR ACTIVITY

Every Friday, take five minutes. Count this week's numbers, then write one thing that worked.

1

WEEK

Week 1 Friday check-in

CONVERSATIONS

APPOINTMENTS

OPEN HOUSE GUESTS

WHAT WORKED?

REPEAT OR DROP NEXT WEEK

2

WEEK

Week 2 Friday check-in

CONVERSATIONS

APPOINTMENTS

OPEN HOUSE GUESTS

WHAT WORKED?

REPEAT OR DROP NEXT WEEK

3

WEEK

Week 3 Friday check-in

CONVERSATIONS

APPOINTMENTS

OPEN HOUSE GUESTS

WHAT WORKED?

REPEAT OR DROP NEXT WEEK

4

WEEK

Week 4 Friday check-in

CONVERSATIONS

APPOINTMENTS

OPEN HOUSE GUESTS

WHAT WORKED?

REPEAT OR DROP NEXT WEEK