rex

Printable planners for real estate agents

www.rexsoftware.com

Your planner, powered by purpose.

This planner was designed with one goal in mind: to help you stay organised, focused, and on track, whether or not you have a fancy CRM doing the heavy lifting.

GOOD NEWS FOR REX CRM CUSTOMERS!

Many of the stats and activities in this planner are already at your fingertips inside Rex. That means you won't need to manually input every detail; this planner simply complements what's already there, giving you a clear, offline overview to keep you centred and proactive each day.

NOT USING REX CRM?

If you're not using Rex (or any CRM that gives you these kinds of insights), this planner becomes your best mate. It's your daily dashboard. Your monthly motivator. A simple way to get a handle on what matters, from call targets to pipeline health and everything in between.

So whether you're old school with pen and paper, or looking for a backup to your digital tools, this planner was made for agents who want to grow their business with intention, not just react to it.

Here's to more structure, less stress, and better results.

Want to learn more about Rex CRM?
Book a demo at www.rexsoftware.com/demo

Daily planner
Set the tone for success

TOP PRIORITIES

1. _____
_____
_____
_____

2. _____
_____
_____
_____

3. _____
_____
_____
_____

MY FOCUS TODAY

☐ Prospecting

☐ Valuations

☐ Property marketing

☐ Paperwork

☐ Client meetings

☐ _____

☐ _____

☐ _____

SECONDARY TASKS

1. _____
_____
_____
_____

2. _____
_____
_____
_____

DAY IN REVIEW

What went well?
_____
_____
_____
_____

What did not go well?
_____
_____
_____
_____

PRO TIPS

- Allocate time for key tasks
- Focus on activities that directly lead to sales
- Tackle revenue-generating tasks in the morning when your energy is highest
- Leverage your CRM to automate follow-ups
- Set specific times to check emails and messages
- Plan for tomorrow, today.

Month in review
Your month, at a glance

MM/YY _____

APPRAISALS

Active _____

Won _____

Lost _____

_____ **% of New Appraisal target met this month.**

INSTRUCTIONS

New instructions _____

Under contract _____

Sold _____

Withdrawn _____

_____ **% of Sales target met this month.**

PERFORMANCE

TIME ON MARKET

Longest _____ days

Shortest _____ days

Average _____ days

SALE PRICE

Highest _____ $

Lowest _____ $

Average _____ $

OTHER ACTIVITIES

Open homes _____

Private inspections _____

Auctions _____

Referrals to PM _____

COMMENTS

_____

_____