CASEY ALVAREZ · WEEKLY OPERATING PLAN

The Week of November 9, 2026

SAMPLE PLAN for a real estate agent. The agent, clients, properties and numbers are all fictional. Built Sunday night from 8 days of email, two weeks of calendar, the CRM and the transaction tracker.

> **The week in one sentence:** Get 418 Birch Lane through its inspection deadline Wednesday, win the Hollis listing appointment Thursday, and make 25 sphere calls so January's pipeline isn't empty.
>
> **Decisions that unblock everything:** price reduction on 92 Willow Court (21 days, no offers) · repair-credit number for Birch Lane · keep or move Thursday's double-booked 4 PM.

READ THIS PAGE FIRST

The Vital Few

If only these five move, the week wins.

#	COMMITMENT	OWNER	DONE WHEN
1	**418 Birch Lane: inspection deadline Wed 5 PM.** Buyer's repair request came in Friday (roof flashing, water heater). Get two contractor estimates Monday, agree a credit number with the sellers Tuesday, respond in writing by Wednesday noon.	**CASEY · RILEY (TC)**	Response signed before deadline
2	**Win the Hollis listing (Thu 10 AM).** 4-bed in Maple Ridge, referred by a past client. CMA draft Tuesday; Casey reviews Wednesday; bring the marketing plan and the last 3 Maple Ridge results.	**CASEY · RILEY PULLS COMPS**	Listing agreement signed
3	**Price conversation on 92 Willow Court.** 21 days on market, 14 showings, 0 offers; 3 showing comments say "price." Bring the sellers the numbers Wednesday, not a feeling.	**CASEY**	Sellers decide: reduce or hold
4	**25 sphere calls** (5 a day). List of 25 past clients and friends not contacted in 6+ months is on the Database page.	**CASEY**	25 logged in the CRM
5	**Clear the 7 owed emails over 3 days old** (Inbox page). One 45-minute block Monday at 1 PM.	**CASEY**	Inbox page all ✓

Last week's wins: 27 Cedar Street closed Friday ($9,600 GCI) · the Nguyens' offer on 418 Birch was accepted over 2 others · open house at 92 Willow pulled 11 groups and 4 new buyer leads · 2 referrals came in from the October client event.

Force-close this week (open 30+ days): the Patterson expired listing follow-up (36 days, still no call) · the photographer's invoice dispute (33 days). Do it or kill it.

READ ALOUD EVERY MORNING

My Principles

Short, present tense, mine.

- **I am the agent people refer.** Every client gets an experience worth talking about.
- **My database is my business.** I talk to my sphere every single week.
- **Deadlines are sacred.** No contract date ever surprises me.
- **I lead with numbers, not opinions.** Sellers decide on data I bring them.
- **Showings end at 7 PM.** My evenings belong to my family.

Daily floor: 5 sphere calls · 2 new conversations with potential sellers · check every contract deadline at 9 AM · reply to clients within 2 hours · 30-minute workout.

Day themes: Mon = admin + pipeline · Tue = prospecting · Wed = listings + seller updates · Thu = appointments + showings · Fri = marketing + review.

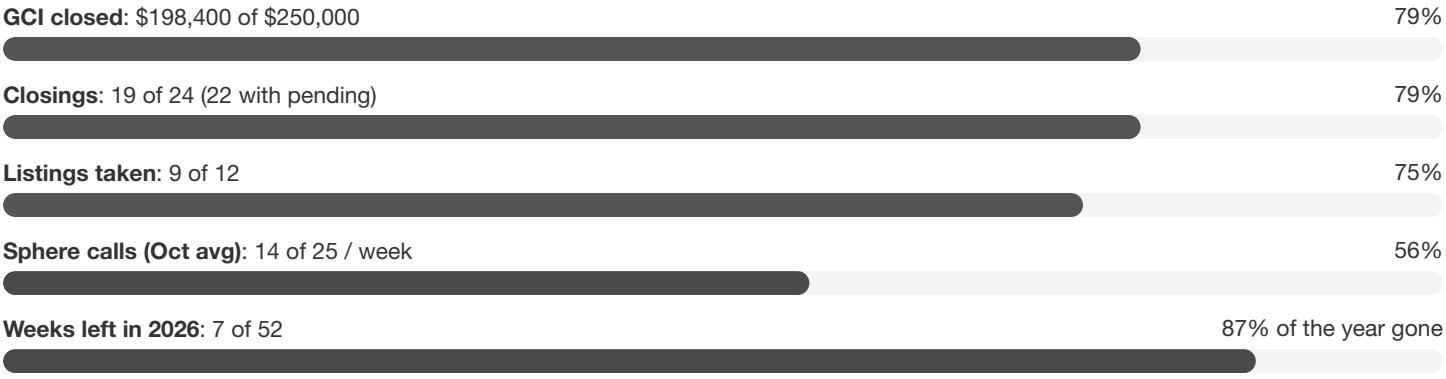
GOALS & NUMBERS

Where Every Goal Stands

Big goal (2028): a 3-agent team doing 60 closings a year · this year is the foundation.

GOAL	2026 TARGET	WHERE IT STANDS (NOV 8)
GCI	$250,000	$198,400 closed YTD + $27,900 pending = $226,300 if everything pending closes
Closings	24	19 closed + 3 pending = 22; 2 more needed by Dec 31
Sales volume	$9M	$7.2M closed + $1.1M pending
Listings taken	12	9 taken; Hollis Thursday would be #10
Sphere contacts	25 / week	Averaged 14 / week in October

Progress to 2026 targets



What the bars say: 2026 is nearly made if the 3 pending deals close. The weak bar is sphere calls, and that's January's pipeline. Calls made this month are closings next spring.

WEEKLY NUMBERS

Pipeline, Money & Lead Sources

From the transaction tracker, CRM, and commission and invoice emails in the last 8 days.

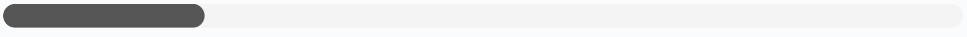
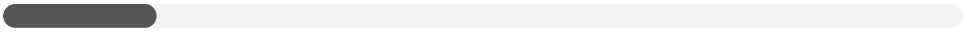
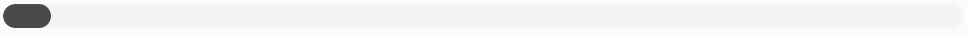
$27,900
Pending GCI across 3 deals under contract

4
Active listings ($2.9M total list price)

7
Active buyers (3 pre-approved, 4 waiting on lender)

11
New leads last week (4 open house · 3 referral · 4 online)

Where this year's closings came from

SOURCE	CLOSINGS	SHARE
Past clients + referrals	11	
Open houses	4	
Online leads	3	
Expireds / FSBOs	1	

Money watch this week

ITEM	AMOUNT	WHEN	ACTION
27 Cedar Street commission (in)	$9,600	Funds Tue	Riley confirms the brokerage received the wire
Photographer invoice (out, disputed)	$450	33 days open	Pay the agreed $300 or settle at $450. Close it Friday
Open house signs + flyers (out)	$186	Thu	Riley orders for Saturday
MLS + association dues (out)	$412	Due 11/15	Pay Monday
Unused lead-gen subscription	$99 / mo	Renews 11/12	Cancel: 0 closings from it in 2026
Tax set-aside (25% of Cedar commission)	$2,400	When funds land	Move to tax savings the same day

THE EMAIL CATCH-ALL

What Your Inbox Is Still Waiting On

8 days of email checked for owed replies, promises you made, contract deadlines, money, VIP clients and unsent drafts. Listing alerts and newsletters skipped.

Replies you owe (oldest first)

FROM	ABOUT	WAITING	NEXT STEP
Photographer	Invoice dispute ($450 vs. $300 quoted)	8 days	Settle Fri (force-close)
The Garcias (buyers)	"Can we see the Oak Street condo again?"	5 days	Book for Thu afternoon
Willow Court sellers (VIP)	"How are showings going?"	4 days	Weekly update Mon + price meeting Wed
Lender: Pat at First Lakeside	Needs the Nguyens' signed addendum	4 days	Riley sends Mon AM (affects closing date)
Past client: the Okonkwos	"What's our house worth these days?"	6 days	Send a 1-page value update. Possible listing
Title company	Survey question on 418 Birch	3 days	Forward to the sellers' attorney
Kids' school	Parent-teacher conference times	5 days	Pick a slot (2 min)

Promises you made (from your Sent mail)

TO	YOU SAID	STATUS
The Garcias	"I'll send you the new listings in Lakeside every Monday."	**MISSED 2 WKS**
Hollis (listing appt)	"I'll bring a full market analysis Thursday."	**DUE THU**
Open house visitor (Dev)	"Let me check if the sellers would consider a rent-back."	**OPEN 6 DAYS**
Patterson (expired)	"I'll call you next week."	**36 DAYS**

Drafts you never sent

- Price-reduction talking points for Willow Court (written Thu). Finish it for Wednesday's meeting.
- "Just sold" email to the Cedar Street neighborhood. Send Tuesday once funds land.

WEEK OF NOV 2–8

Last Week Tally

Built from your hand marks on last week's plan, plus the email sweep.

STATUS	ITEM	WHERE IT LANDED
DONE	27 Cedar Street closed Friday	Commission funds Tue · ask for a review
DONE	Nguyens' offer on 418 Birch accepted (3 offers)	Inspection deadline Wed
DONE	Willow Court open house: 11 groups, 4 leads	Leads in CRM; follow-up Tue
DONE	Hollis listing appointment booked (Thu 10 AM)	CMA Tue
DONE	Workout 4 of 5 · family movie night	Floor held
MISSED	Sphere calls: 9 of 25	5 a day this week (Vital Few #4)
MISSED	Garcia Monday listing email (2nd week)	Set up an automatic MLS search Mon
MISSED	Patterson expired follow-up	Call Tue or drop
UNKNOWN	Did the Willow Court sellers get last week's showing report?	Mark ✓ or ✗

Pattern worth noticing: deal work got done and prospecting didn't. Closings this week come from last spring's calls. Sphere calls go first every morning, before email.

THE WEEK

Monday & Tuesday

Monday is deadlines and pipeline. Tuesday is prospecting.

Monday Nov 9

ADMIN + PIPELINE

Appointments (confirmed)

- **9:30 Office meeting** (brokerage, 30 min). **CASEY**
- **11:00 Contractor at 418 Birch**: estimate on roof flashing + water heater. **CASEY · RILEY LETS HIM IN**

Essential actions

- 5 sphere calls before 9:30. **CASEY**
- Second contractor estimate requested (need 2 by Tuesday). **RILEY**
- Weekly showing update to the Willow Court sellers + set Wednesday's price meeting. **CASEY**
- Set up an automatic Lakeside MLS search for the Garcias (no more missed Mondays). **CASEY · 10 MIN**
- 1:00–1:45 reply block: the 7 owed emails. **CASEY**
- Cancel the unused lead-gen subscription · pay MLS dues. **CASEY · 5 MIN**

Delegated / waiting on

- Riley: Nguyens' signed addendum to the lender · title survey question to the sellers' attorney. **RILEY**

Tuesday Nov 10

PROSPECTING

Appointments (confirmed)

- **12:00 Lunch with Tony Ortiz** (lender partner): referral swap + January first-time buyer seminar. **CASEY**

Essential actions

- 5 sphere calls · call the 4 Willow Court open-house leads. **CASEY**
- Birch Lane: review 2 estimates with the sellers; agree the credit number. **CASEY**
- Value update to the Okonkwos (possible listing). **CASEY · RILEY PULLS COMPS**
- Call Patterson (expired) or drop it from the list. **CASEY**
- "Just sold" email to Cedar Street neighbors once funds land. **RILEY SENDS**

Delegated / waiting on

- Riley: Hollis CMA draft to Casey by 5 PM. **RILEY**

THE WEEK (CONT.)

Wednesday to Friday

Wednesday listings + deadline · Thursday appointments · Friday marketing + review.

Wednesday Nov 11

LISTINGS + SELLER UPDATES

- ⚠ **12:00 Birch Lane repair response due** (deadline 5 PM, so send by noon). **CASEY · RILEY**
- **2:00 Willow Court price meeting** (sellers' home). Bring: 14 showings, 3 price comments, 4 active competitors, 2 recent solds. **CASEY**
- Review the Hollis CMA; print the listing presentation. **CASEY**
- 5 sphere calls. **CASEY**

Thursday Nov 12

APPOINTMENTS + SHOWINGS

- **10:00 Hollis listing appointment** (Maple Ridge). Goal: signed agreement. **CASEY**
- **2:00–3:30 Garcias: Oak Street condo second look** + 2 new options. **JAMIE (BUYER'S AGENT)**
- ⚠ **4:00 double-booked:** Nguyens' final walkthrough prep call AND school conference. Move the call to 5 PM (it's a call; the conference is in person). **CASEY DECIDES MON**
- 5 sphere calls. **CASEY**

Friday Nov 13

MARKETING + REVIEW

- If Hollis signed: photos + listing launch plan for next week. **RILEY**
- Saturday open house at 92 Willow: signs, flyers, social post. **RILEY · JAMIE HOSTS**
- Force-close: photographer invoice · Patterson (if no call Tuesday, drop it). **CASEY**
- 5 sphere calls; tally the week's 25 in the CRM. **CASEY**
- Mark up this plan; dictate the week's tally. **CASEY + CLAUDE**

Daily floor: 5 sphere calls · 2 seller conversations · 9 AM deadline check · 2-hour client reply · 30-minute workout.

Weekend: Saturday 1–3 PM open house at 92 Willow (Jamie hosts; Casey is off). Sunday protected.

AREA 1

Deals Under Contract & Active Listings

Source: transaction tracker + contract emails. Every date checked at 9 AM daily.

Under contract

DEAL	STATUS	OWNER	NEXT DATE / ACTION
418 Birch Lane: Nguyens buying, $485,000 · GCI $12,100	INSPECTION	Casey · Riley	**Wed 5 PM** repair response · appraisal 11/16 · close 12/4
15 Harbor View #3B: listing, $310,000 · GCI $7,800	CLEAR	Riley	Appraisal came in at value · close 11/20
660 Ridge Road: buyer side, $335,000 · GCI $8,000	FINANCING	Jamie · Riley	Loan commitment due 11/17 · close 12/1

Active listings

LISTING	STATUS	OWNER	NEXT ACTION
92 Willow Court: $629,000 · 21 days	NO OFFERS	Casey	Price meeting Wed · open house Sat
7 Juniper Way: $899,000 · 9 days	STRONG	Casey	2 second showings; ask agents for feedback Mon
301 Lakeside Dr #12: $415,000 · 45 days	STALE	Casey	New photos done; relaunch email Fri
18 Pine Hollow: $972,000 · coming soon	PREP	Riley	Stager Tue · photos Thu · live 11/19

Listing appointments

SELLER	STATUS	OWNER	NEXT ACTION
Hollis: Maple Ridge 4-bed (referral)	THU 10 AM	Casey	CMA Tue · presentation Wed
Okonkwos: past clients asking value	WARM	Casey	Value update Tue · offer a walkthrough

Who handles what: Riley (transaction coordinator) owns every contract date, document, lender/title contact and vendor booking. Jamie (buyer's agent) owns showings and buyer follow-up. Casey owns pricing conversations, listing appointments, negotiations and signatures.

AREA 2

Buyers

Source: CRM + showing emails. 7 active buyers.

BUYER	STATUS	OWNER	NEXT ACTION
The Garcias: Lakeside condo, up to $450K	PRE-APPROVED	Jamie	Oak Street second look Thu · automatic MLS search Mon
Dev R.: open-house lead, Willow Court	INTERESTED	Casey	Answer the rent-back question (open 6 days)
The Parks: relocating in March	EARLY	Jamie	Monthly market email · lender intro
Morgan T.: first-time buyer	LENDER	Jamie	Waiting on pre-approval; check in Wed
3 open-house leads from Willow Court	NEW	Jamie	Call Tue; book buyer consultations

Buyer rule: no showings without a signed buyer agreement and a pre-approval. Two of the seven are missing one or the other; Jamie closes both gaps this week.

AREA 3

Database & Sphere

Source: CRM. These 25 haven't been contacted in 6+ months. 5 calls a day.

DAY	CALL THESE FIVE	REASON TO CALL
Mon	Okonkwo · Lee · Brennan · Shah · Duarte	Home-value update · 3-year home anniversaries
Tue	Fitzgerald · Moreno · Kim · Abbott · Ruiz	Cedar Street "just sold" nearby
Wed	Novak · Patel · Hughes · Ward · Becker	Year-end market snapshot
Thu	Ellis · Grant · Rossi · Chen · Murphy	Holiday client event invite
Fri	Owens · Silva · Reed · Foster · Bauer	"Who do you know thinking of moving in spring?"

Marketing this week

ITEM	STATUS	OWNER	NEXT ACTION
Monthly email newsletter	**DRAFT**	Riley	Casey approves the market numbers Thu; send Fri
"Just sold" postcards: Cedar Street	**READY**	Riley	Mail Wed (100 homes)
Holiday client event (Dec 12)	**PLANNING**	Riley	Venue deposit by 11/20
2 social posts: Juniper Way + Pine Hollow coming soon	**SCHEDULED**	Riley	Casey reviews captions Mon

PERSONAL

Health, Family & Admin

Family items are commitments, not leftovers.

ITEM	DEADLINE	THIS WEEK'S MOVE
Parent-teacher conference	**THU 4 PM**	Pick slot Mon; move the 4 PM call to 5 PM
License continuing education	Dec 31	6 of 14 hours left: book the online course Fri
Q4 estimated taxes	Jan 15	Set aside 25% of every commission as it funds
Car service (60K miles)	This month	Book for a Friday morning
Family	—	Friday movie night · Sunday protected · showings end at 7 PM

Health tracker

METRIC	TARGET	MON	TUE	WED	THU	FRI
Workout	30 min daily					
Sleep	7 hours					
Water	8 glasses					
Sphere calls	5					

Protected: no showings after 7 PM on weekdays; Sunday is family day. Jamie covers anything that can't wait.

ANCHORS & AGING

Calendar & Open Loops

A calendar hold isn't a confirmed appointment. ⚠ = needs a decision.

WHEN	WHAT
Mon 11/9	9:30 office meeting · 11:00 contractor at 418 Birch · 1:00 reply block
Tue 11/10	12:00 lender lunch (Tony Ortiz) · 27 Cedar commission funds
Wed 11/11	⚠ 418 Birch repair response (deadline 5 PM) · 2:00 Willow Court price meeting
Thu 11/12	10:00 Hollis listing appointment · 2:00 Garcias showing (Jamie) · ⚠ 4:00 school conference vs. Nguyens' call
Fri 11/13	Newsletter send · open-house prep
Ahead	Sat 11/14 Willow open house · Mon 11/16 Birch appraisal · Tue 11/17 Ridge Road loan commitment · Thu 11/19 Pine Hollow goes live · Fri 11/20 Harbor View closing · Tue 12/1 Ridge Road closing · Fri 12/4 Birch closing · Sat 12/12 client event

Open 14+ days, oldest first

ITEM	AGE	OWNER	VERDICT THIS WEEK
Patterson expired listing follow-up	36 days	Casey	Call Tue or drop
Photographer invoice dispute	33 days	Casey	Settle Fri
Update online reviews page with 3 new reviews	24 days	Riley	Delegate: Riley posts Wed
Client gift list for closings this year	19 days	Riley	Delegate: Riley drafts list + budget
Video walkthrough for 7 Juniper	15 days	Casey	Film Thu after Hollis, or kill it

PARKING LOT

Decisions Only You Can Make

One decision per box. Dictate one-liners during the week.

92 Willow Court price: recommend $15,000 or $25,000? The 2 recent solds support $605K–$615K. Decide your recommendation before Wednesday's 2 PM meeting.

418 Birch repair credit: estimates expected Tuesday. What's the most you'll advise the sellers to give before you'd counter with a repair instead?

Thursday 4 PM double-booking: move the Nguyens' call to 5 PM? Default if you say nothing: yes.

Numbers that don't match: the CRM shows 19 closings, but the transaction tracker shows 20. One deal may be logged twice or missing a close date. Check before quoting your year-end number.

Holiday client event: the venue needs a $500 deposit by 11/20. Go ahead, or switch to a home-delivered gift this year?

Jamie's split: Jamie asked about a higher split on self-generated leads. Answer now or at the year-end review?

How this plan works: print it · mark it all week (✓ done · ✗ killed · → moved) · next week say "*run my weekly plan*" and read your marks back. **This build used:** Gmail (8 days) · Google Calendar (2 weeks) · CRM · transaction tracker · last week's marked-up plan. **Couldn't reach:** none.