Operations & Systems

Overview

(CONCISE)

My 2026 operations prioritize consistency, clarity, and high-impact prospecting, with a strategic focus on seller acquisition and a future-oriented approach to market insights.

(FULL)

My 2026 operations are designed around clarity, consistency, and high-impact activity — with a strong emphasis on prospecting, listing acquisition, and future-focused market expertise. Everything in this section supports my identity as "The Denver Agent Who Explains the Future" needs to be rephrased or changed completely.

Daily Workflow

A schedule that I liked so far…

(concise)

- 5 AM wake, 5:15–6:15 workout
- 7 AM–12 PM: Admin (1 hr) + Prospecting & Farming (3 hrs)
- Brokerage meetings integrated as needed
- 12–2 PM: Lunch + 30-min recharge
- 2–6 PM: Client-facing appointments
- 6–8 PM: Personal time & making dinner for Elsa

- After 8 PM: Wind-down & early bedtime

(full)

Morning Foundation

- 5:00 AM – Wake up
- 5:15–6:15 AM – Workout at apartment gym
- 6:15–6:45 AM – Morning routine & getting ready
- 6:45–7:00 AM – Quick check of priorities (physical planner + AI summary)

Strategic Morning Sprint (7 AM–12 PM)

This is my highest-value block each day — the "engine room" of my success.

- Admin & Alignment — 1 Hour
  * Emails & messaging
  * Transaction statuses
  * Review of business plan goals
  * Updating physical planner
  * Reviewing KPIs from previous day
- Prospecting & Farming — 3 Hours
  Prospecting is the priority of my 2026 strategy. This includes:
  * Circle prospecting calls
  * Database follow-up
  - Neighborhood walking & conversations
  * Coffee shop working blocks between home and Lakewood
  * Farm-area touchpoints
  * Social prospecting & sphere nurturing
  * Neighborhood data insight gathering
  * Real estate conversations anchored in "future trend translation" (my positioning advantage)

- Brokerage Meetings (3–4×/week)
  If meetings occur before noon, the schedule remains flexible — but prospecting work is redistributed to later in the day.
  Drive time between home and Lakewood (35–40 mins each way) becomes an opportunity for:
  * Prospecting calls
  * Podcast learning
  * Market forecasting research

Midday Recovery (12 PM–2 PM)

My energy dips early afternoon; this is intentional recovery time.

- Healthy meal
- 30-minute nap (recharge block)
- Light admin or content scheduling if needed

Weekly, Monthly, and Quarterly Structure

(concise)

Sunday: Rest day (exceptions for active deals)

Monday: Weekly review, planning, social scheduling

Tuesday–Saturday: Production (prospecting + fieldwork)

Monthly: One Monday reserved for full review & planning

Quarterly: Goal review with success coach (Jarrett)

Custody schedule: Elsa is with me every other week (Sun–Sun); evening dinner is a fixed responsibility.

Holidays are protected offline days unless urgent contract matters arise.

(full)

Daily Rhythm Framework

- 7 AM–12 PM: High-focus work — prospecting, farming, client acquisition
- 12–2 PM: Recovery & light admin
- 2–6 PM: Client-facing appointments
    * Showings
    * Consultations
    * Writing/negotiating offers
    * Follow-up outreach
- 6–8 PM: Personal/Home Time
    * Making dinner for Elsa (nightly responsibility when she is with me)
    * Connection time
    * Light household reset
- After 8 PM: Wind-down & bedtime preparation → early sleep

Weekly Structure

Sunday — Protected Day Off
With the expectation that real estate emergencies may arise in active transactions.

Monday — Strategy Day

- Weekly review (previous week's KPIs, goals, missed targets, successes)
- Planning the week ahead
- Scheduling social posts for the upcoming week

- Reviewing pipeline & priority leads

Tuesday–Saturday — Production Days

- Prospecting-heavy mornings
- Field-heavy afternoons
- High visibility in the community

Monthly Structure

One Monday per month is fully reserved for:

- Monthly business review
- Updating KPIs
- Forecasting market trends
- Reviewing geographic farm performance
- Resetting systems & messages
- Planning for the upcoming month

Quarterly Structure

Meet with Jarrett (Success Coach) to review:

- Progress toward quarterly goals
- Prospecting volume
- Listing acquisition performance
- Market presence
- System efficiency
- Goal pacing toward 12+ transactions

Custody Schedule Integration

Elsa is with me Sunday → Sunday every other week.
She has her own transportation and independence, so operational flow remains consistent.

Dinner every evening (6–8 PM) is a fixed responsibility and protected time.

Holiday Structure

All major holidays are "offline days," unless active-contract obligations require attention.

AI-Assisted Scheduling Philosophy

My vision for 2026 includes AI as a scheduling partner:

- Daily schedule summary
- Reminders for meetings & calls
- Nudges for prospecting consistency
- Automatic rearrangements when appointments shift
- Weekly planning prompts
- Monthly KPI reviews
- Goal-alignment nudges
- Minimizing phone dependency
- Syncing digital reminders with my physical planner

AI becomes a "second brain" that reinforces structure without requiring constant device use.

Transaction Systems

(concise)

Primary Focus: Sellers

- Listing presentation using CB tools
- Market prep, photography, automated marketing
- Pricing strategy with future-focused insights
- Weekly reports + smooth under-contract workflow

Buyers are supported through a structured onboarding process, showing plans, and consistent under-contract updates.

Standardized checklists cover pre-listing, listing launch, buyer onboarding, under-contract, compliance, and post-closing.

(full)

My systems prioritize seller acquisition, which has historically been my easiest and most intuitive path to business. Buyer business will still be present, but listings are the operating core.

Seller Workflow (Primary Focus)

- Intake consultation with CB's elite listing presentation
- Market analysis with future-trend overlay
- Property preparation plan
- Photography + CB's marketing suite for brochures & collateral
- Listing launch sequence
- Weekly seller reports
- Offer review with forward-looking pricing strategy
- Under-contract communication
- Closing + long-term client care

This process taps directly into Coldwell Banker's exceptional marketing engine, freeing me to focus on relationships and strategy instead of design and production.

Buyer Workflow (Secondary but Important)

- Buyer consultation

- Needs analysis with future-market insights

- Home search customized with forecasting awareness

- Showings

- Offer structuring

- Under-contract weekly touchpoints

- Closing + long-term client care

Buyers are an important part of my business, but my operational systems emphasize listing-side volume as the fastest path to consistency, referrals, and growth.

Checklists & SOPs

Standardized workflows:

- Pre-listing checklist

- Listing launch timeline

- Buyer onboarding checklist

- Under-contract workflow

- Compliance & documentation procedures

- Post-closing follow-up system (30–60–90 day touchpoints)

Technology & AI Stack

(concise)

- Heavy reliance on Coldwell Banker's marketing tools (brochures, photography, digital presentations, automated collateral)

- CRM + cloud file storage

- AI support for:
  * Market research

       *   Prospecting scripts

       *   Social media strategy

       *   Calendar reminders

       *   KPI analysis

       *   Forecasting & planning

(full)

Coldwell Banker Digital Tools (Primary)

In 2026, I will rely heavily on CB's robust toolkit:

- Property brochures (high-end, polished, ready-made)
- Automated marketing assets
- Professional photography packages
- Listing concierge features
- CMA + pricing tools
- Digital presentations
- Market reports
- Lead-gen dashboards
- Client-ready digital content

This reduces design workload and increases scalability.

AI Support

AI enhances:

- Market research
- Trend interpretation
- Prospecting scripts
- Communication templates

- Social media strategy
- Calendar optimization
- Accountability
- KPI interpretation
- Action recommendations

General Tools

- CRM
- File management
- Scheduling software
- Social media scheduler
- Mapping/farming tools
- Spreadsheet dashboards

Communication Systems

(concise)

- Email/text: 2-hour response
- Sellers: weekly report
- Buyers: 3 updates/week
- Templates for inquiries, offers, updates, and follow-ups

(full)

Data & Metrics Tracking

(concise)

Weekly KPIs:

- Conversations
- New contacts added
- Follow-ups
- Listings secured
- Farming touches
- Social engagement
- Pipeline volume
- Contract-to-close
- Transaction pacing toward 12+ deals

AI assists with KPI evaluation and operational recommendations.

(full)

Weekly KPIs:

- Prospecting conversations
- Database growth (# added)
- Follow-up attempts
- Contact-to-appointment conversion
- Listings won
- Farming touchpoints
- Social engagement
- Pipeline volume
- Contract-to-close speed
- Transaction pacing toward 12+ deals

AI assists by:

- Detecting bottlenecks

- Predicting prospecting volume needed to hit goals
- Highlighting which activities drive the most results
- Maintaining accountability

Risk Management & Boundaries

(concise)

- Compliance with CB protocols
- Redundant digital storage
- Protected evenings and holidays
- Early bedtime to sustain peak performance
- Safety awareness during showings
- Weekend work only when required by active deals

(full)

- Secure file storage following CB Realty protocols
- Redundant cloud backups
- Protected personal time (evenings & holidays)
- Early bedtime to maintain morning performance
- Maintaining professional boundaries & safety during showings
- Weekend work only when tied to active deals