

GET ORGANIZED™ • FREE DOWNLOAD

The Organization Pack

A starter set of templates to get your systems off the ground in an afternoon.

Disorganization doesn't announce itself. It shows up as a file you can't find during a negotiation, a past client you meant to call in March, and a Sunday night spent rebuilding a week that should have already had a shape.

Most agents try to fix that by working harder inside the mess. This pack fixes the mess itself — six pieces of structure, set up in one afternoon, that keep working long after the motivation that built them wears off.

Nothing here requires new software, a subscription, or a team. It requires four hours and the willingness to decide things once instead of deciding them daily.

Before you start

Print this pack. Block one afternoon. Turn off notifications. This is the rare work that cannot be done in the cracks between showings, and doing it in fragments is why the last three attempts didn't hold.

The afternoon, in order

Work the sections in sequence. Each one assumes the one before it is finished — the file system needs somewhere to put things, the database sort needs a capture standard, and the weekly rhythm needs to know what it's protecting.

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|-----------|--|------------|
| 01 | The Afternoon Setup Guide | READ FIRST |
| | <i>The full sequence with timing, so four hours is a plan instead of a hope.</i> | |
| 02 | The Quiet Team™ Setup Sheet | 45 MIN |
| | <i>Five seats. What each one carries now, what it should carry, and the gap between.</i> | |
| 03 | The File System Map | 30 MIN |
| | <i>A folder structure and naming convention you can copy in fifteen minutes.</i> | |
| 04 | The Database Sort | 60 MIN |
| | <i>Sorting your sphere into tiers so the CRM has something to act on.</i> | |
| 05 | The Contact Capture Standard | 20 MIN |
| | <i>One page, so nothing enters your business unstructured again.</i> | |
| 06 | The Weekly Operating Rhythm | 25 MIN |
| | <i>Which work happens on which day, decided once.</i> | |

Two free companions to this pack

This pack builds the structure. Two other free downloads run it day to day — the **Weekly Focus Planner** for the week's priority and numbers, and the **Daily Momentum Tracker** for the 13 Edge Actions™. Both are at soloagentacademy.com, no email required.

A note on what this pack does not do: it will not tell you what to write, what to send, or how many of anything to do. Structure and content are different problems, and mixing them is why most "systems" downloads end up unused. Get the structure standing first.

The Afternoon Setup Guide

3 HR 20 MIN

The sequence, timed. Check each box as you finish it.

- ☐ **01 Set up the file system first** 30 MIN
- Section Three. Build the empty folders before you have anything to put in them. Every step after this needs somewhere for its output to live, and retrofitting a structure onto files already scattered across a desktop takes three times as long.
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- ☐ **02 Sort the database** 60 MIN
- Section Four. The longest step and the one most agents skip. Sort your sphere into working tiers so that every future decision about who to contact has already been made. Set a timer and stop at sixty minutes even if you aren't finished — an imperfect sort beats an unsorted list.
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- ☐ **03 Set the capture standard** 20 MIN
- Section Five. Decide what you collect on every new contact, in what order, and where it goes. Then put a copy of the page in your car and one by your desk. This is the step that keeps the sort you just finished from decaying.
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- ☐ **04 Assign the Quiet Team™** 45 MIN
- Section Two. Now that you can see the structure, decide which seat carries which work. This is where the afternoon stops being cleanup and starts being a business decision.
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- ☐ **05 Set the weekly rhythm** 25 MIN
- Section Six. Give the week a shape before next week has a chance to demand one. Then put it on the calendar as recurring blocks — a rhythm that lives only on paper is a preference, not a system.
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- ☐ **06 Run it for two weeks before changing anything** ONGOING
- The urge to improve the system will arrive around day three. Ignore it. Two weeks of running a mediocre system teaches you more than two hours of designing a perfect one.
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If you only have ninety minutes

Do steps 01 and 03 — the file system and the capture standard. Those two alone stop the bleeding. The database sort can happen across three evenings, and the Quiet Team™ assignment will be clearer once you've watched a week of your own work with a structure underneath it.

The Quiet Team™ Setup Sheet

45 MIN

Five seats. You are one of them — not all of them.

You are not building a business without a team. You're building one with a **Quiet Team™** — five seats that carry the work, only one of which is a person. The seats exist whether or not you've assigned them. The difference between an organized practice and an exhausting one is whether the assignments were made on purpose.

Fill the middle column honestly. If the Agent seat carries almost everything, that isn't a character flaw — it's the diagnosis this page exists to produce.

SEAT	WHAT IT CARRIES TODAY	WHAT IT SHOULD CARRY	FIRST CHANGE
Agent <i>Judgment, conversations, negotiation. The 30% only you can do.</i>			
AI <i>Drafting, summarizing, research, first passes. Never final judgment.</i>			
CRM <i>Memory. Who, when, what next — so you never have to hold it.</i>			
MLS <i>Inventory, comparables, market signals, saved searches.</i>			
File System <i>Documents, transactions, records. Findable in five years.</i>			

Working rules for the AI seat

The AI seat is the newest and the easiest to misuse. Before you assign anything to it, confirm your brokerage's policy. These are non-negotiable in most brokerages and worth adopting regardless:

- No free or public AI tools with client information.
- No AI-driven inferences about protected classes — a fair housing exposure, not a gray area.
- No AI-generated transaction forms.
- Written disclosure to clients for any client-facing AI use.
- Clear labeling of AI-edited or virtually staged photos.

The 40/30/30 doctrine: your Quiet Team™ carries roughly 40% of the work, your Edge Business Partner™ planner carries 30%, and you retain 30% — judgment, conversations, and negotiation. The goal was never to remove yourself from the business. It's to stop spending your best hours on the 70% that doesn't need you.

The File System Map

30 MIN

Build the empty folders first. Fill them as work arrives.

The test of a file system isn't whether you can find something today. It's whether you can find it in five years, on a different computer, while someone waits on the phone. Build for that and the daily version takes care of itself.

THE STRUCTURE — COPY IT EXACTLY

Real Estate Business

- 01_Active_Listings — *one folder per address*
- 02_Active_Buyers — *one folder per client*
- 03_Pending — *moved here at contract, not at closing*
- 04_Closed — *by year: 2026, 2027...*
- 05_Past_Clients — *the referral source, kept separate on purpose*
- 06_Business_Admin — *finances, brokerage, insurance, vendors*
- 07_Marketing_Assets — *photos, logos, templates, headshots*
- 08_Education_Licensing — *CE, certifications, renewals*

INSIDE EVERY TRANSACTION FOLDER — THE SAME SEVEN, EVERY TIME

2026-03-14_1420_Oak_Street

- 01_Agreement · 02_Disclosures · 03_Marketing · 04_Offers
- 05_Contract · 06_Inspection_Appraisal · 07_Closing

THE NAMING CONVENTION

YYYY-MM-DD_Address_DocType_v#

- 2026-03-14_1420_Oak_Street_ListingAgreement_v2.pdf
- 2026-04-02_1420_Oak_Street_InspectionResponse_v1.pdf

Why the date goes first

Date-first names sort themselves chronologically without any effort from you, in every operating system, forever. No underscores between words in an address, no spaces anywhere, no "final_FINAL_v3_actual" — the version number is already in the name, so use it.

Numbering the top-level folders keeps them in the order you work, not alphabetical order. That's why they're 01 through 08 instead of Active, Admin, Buyers.

Confirm document retention periods and storage requirements with your brokerage before you archive or delete anything. Retention rules vary by state and by brokerage policy, and this structure is designed to hold records, not to decide how long you keep them.

The Database Sort

60 MIN

A list is not a database. Tiers are what make it actionable.

Most agents don't have a contact problem. They have a sorting problem — six hundred names in a phone with no way to answer the only question that matters on a Tuesday morning: *who should I talk to today?*

Sort every contact into one of four tiers. Set a timer for sixty minutes and stop when it goes off. An imperfect sort you finish beats a perfect one you abandon.

TIER	WHO BELONGS HERE	WHAT THEY GET	HOW MANY	WHERE I'LL START
A <i>Advocates</i>	They know you, trust you, and would send someone your way today without hesitating.	Personal contact on a set rhythm, plus everything below. These are conversations, not campaigns.		
B <i>Known</i>	Past clients and warm relationships who'd recognize your name but wouldn't think of you first.	Consistent visibility on a fixed cadence. The goal is moving them to A.		
C <i>Aware</i>	Sphere, referrals-in-waiting, people met once. Real, but not yet relationships.	Broadcast visibility only. Newsletter, social, market updates.		
D <i>Unsorted</i>	Everyone you haven't decided about yet, plus contacts with missing information.	Nothing until they're sorted. This tier should shrink every month.		

Three rules that make the sort hold

- **Sort by relationship, never by perceived value.** You cannot tell who is about to move, and guessing is how agents end up ignoring the person who was about to list.
- **Never sort by any protected characteristic** — race, color, religion, national origin, sex, familial status, disability, or any other protected class. Tiers describe your relationship with a person. Nothing else.
- **Every contact gets exactly one tier.** When you can't decide between two, choose the lower one. Contacts move up through contact, which is the entire point.

Tier A is the smallest tier and the one that produces the most business. If your A list has more than about forty names, you are probably describing people you like rather than people who would actively refer you. Be honest — the list is only useful if it's true.

The Contact Capture Standard

20 MIN

Nothing enters the business unstructured. Print one. Keep it visible.

Most CRMs don't fail because they're bad software. They fail because what goes into them is inconsistent — three fields one time, eleven the next, and a note that says "met at open house, seemed nice." Decide the standard once and the CRM finally has something to work with.

CAPTURE THIS, IN THIS ORDER, EVERY TIME	
Name	
Best channel <i>Call, text, email — how they prefer to hear from you</i>	
Source <i>Where this contact came from. Always fill this in.</i>	
Stage <i>Aware · Considering · Active · Under contract · Past</i>	
Timeline <i>In their words, not your estimate</i>	
What's driving the move <i>The reason underneath the reason</i>	
Area and range <i>Where they're looking, what they've said about price</i>	
Next step and date <i>A specific action with a date on it. Never "follow up."</i>	
Tier <i>A · B · C · D — assign it now, adjust it later</i>	

What never goes in the record

Do not record — in the CRM, in notes, or anywhere else — any observation or assumption about a person's race, color, religion, national origin, sex, familial status, disability, or any other protected characteristic. This includes indirect notes about schools, churches, neighborhood "fit," or family makeup.

Client records can be discoverable. Write every note as though it will be read aloud by someone who was not in the room.

The single most valuable field on this page is Source. Filled in consistently for twelve months, it tells you exactly where your business actually comes from — which is almost never where agents assume it comes from, and it will change what you stop doing.

The Weekly Operating Rhythm

25 MIN

Give the week a shape before it has demands.

A week without a shape gets one anyway — assigned by whoever emails first. Assigning each day a primary job doesn't make you rigid. It makes the interruptions visible, which is the only way to decide whether they're worth taking.

Below is a starting rhythm that works for most independent agents. Adjust it to your market and your life, then write yours in the right column and put it on the calendar as recurring blocks.

DAY	PRIMARY JOB	WHAT THAT LOOKS LIKE	MY VERSION
Monday	Plan and reach out	Set the week's One Thing and numbers. Then conversations — the highest-value work, done before the week gets loud.	
Tuesday	Appointments	Listing appointments, buyer consultations, showings. Clustered on purpose so the rest of the week stays intact.	
Wednesday	Inventory and visibility	Active listings, seller updates, marketing, content. The work that compounds and never feels urgent.	
Thursday	Database and follow-up	Tier A and B contact, past clients, pending files, anything with a date attached in your CRM.	
Friday	Review and close	Fill in the week's actuals. Admin, files, next week's shape. Then stop.	
Protected <i>Non-negotiable</i>	Not the business	Written down before the week can take it. This row is the one that decides whether the other five last a year.	

The rhythm survives contact with reality — or it doesn't

Deals close on the wrong day. Inspections land Tuesday. The rhythm isn't a promise that every week goes to plan; it's a default the week returns to once the emergency passes. An agent with a rhythm loses a day. An agent without one loses the week.

What you just built

In one afternoon you gave your business a place to put things, a way to decide who to talk to, a standard for what enters the system, an assignment for who carries what, and a shape for the week. That's not organization for its own sake. That's the infrastructure underneath a calm practice.

THE NEXT TWO WEEKS

WHEN	WHAT TO DO
Days 1-14	Run it exactly as built. Change nothing, including the parts that annoy you. You're gathering evidence, not designing.
Day 15	Fix the one thing that broke most often. One thing. Then run it another two weeks.
Every quarter	Re-sort tier D, re-check the Quiet Team™ assignments, and confirm the rhythm still matches the business you actually have.

THREE SIGNATURES ON THE AFTERNOON

The one change I made today that I'll feel first	
The part of this most likely to slip	
Date I'll review this	

Structure holds the business. A system runs it.

This pack gives your practice a shape. The **Edge Business Partner™** planner runs it — the 13 Edge Actions™ tracked by week, your conversation math calculated to your closing goal, the weekly and quarterly review rhythm already built, and ninety days of structure that doesn't depend on you remembering to keep it.

Free companions, no email required: the Weekly Focus Planner and the Daily Momentum Tracker.

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