

# The Time Savings Checklist

As a solo agent, your time is the whole business. You don't lose it in big dramatic chunks — you lose it in small leaks: the same conversation you have over and over, the admin scattered across your week, the yes you gave that you should have systemized. This checklist finds the leaks and hands each one to a system, so the work still gets done — just not by you, and not twice.

## HOW TO USE THIS

Read each item honestly. Check the ones you've already systemized. Leave the rest empty — those are your time leaks, in priority order. You don't have to fix them all at once. Pick the two that would give you back the most hours, and start there. The rhythm on the last page keeps the time you reclaim from leaking back out.

LEAK  
01

## Repeated Conversations

The biggest leak

*The same questions and explanations, over and over. This is where most solo hours vanish.*

- ☐ **I have saved answers for the questions I get asked on every deal.**  
Financing basics, timelines, next steps. **Fix:** write them once, reuse them forever.
- ☐ **My buyer and seller onboarding is a repeatable flow, not a fresh explanation each time.**  
**Fix:** one welcome sequence that every new client moves through the same way.
- ☐ **I have a first-appointment framework I reuse instead of rebuilding each time.**  
**Fix:** a consistent structure means less prep and a sharper conversation.
- ☐ **My most-sent messages live as templates I can personalize in seconds.**  
**Fix:** the follow-up you type daily should be a starting point, not a blank page.

LEAK  
02

## Scattered Admin

Death by a thousand tasks

*Small tasks touched five times because they never have a home or a time.*

- ☐ **I batch similar tasks instead of switching between them all day.**  
Every context switch has a cost. **Fix:** group calls, emails, and paperwork into blocks.
- ☐ **My files follow one naming and folder system, every time.**  
**Fix:** a system you never think about beats hunting for the same document twice.
- ☐ **Recurring deadlines and dates live in one place I actually check.**  
**Fix:** your calendar and CRM hold the dates so your memory doesn't have to.
- ☐ **I handle each piece of paperwork once, at a set time — not whenever it interrupts me.**  
**Fix:** a daily admin block turns a hundred interruptions into one focused pass.

LEAK  
03

## Reinventing the Week

No default structure

---

*When every week is built from scratch, planning itself becomes the time cost.*

- ☐ **I have a default weekly structure — known blocks for prospecting, clients, and admin.**  
**Fix:** a template week means you adjust, not rebuild, every Monday.
- ☐ **I set my top priorities the day or night before — not while staring at the morning.**  
**Fix:** deciding in advance protects your first productive hours.
- ☐ **My income-producing work is protected on the calendar before anything else fills in.**  
**Fix:** book the conversations that close deals first; let the rest fit around them.

LEAK  
04

## Doing What a System Should

Your Quiet Team™

---

*Work you do by hand that a tool could carry — freeing you for the parts only you can do.*

- ☐ **My CRM sends the routine follow-ups so I'm not remembering to.**  
**Fix:** let the system carry the reminders; you carry the relationship.
- ☐ **I use tools to draft the first version of routine content and messages.**  
**Fix:** starting from a draft is faster than starting from nothing.
- ☐ **My tools work together instead of forcing me to bridge them by hand.**  
Re-typing the same info into three places is a leak. **Fix:** connect what you can.
- ☐ **I've stopped using tools I don't need just because I signed up for them.**  
Tool sprawl costs time and attention. **Fix:** fewer tools, used fully, beats many used partly.

LEAK  
05

## Saying Yes by Default

Boundaries save hours

---

*Not every request deserves a yes, and not every yes deserves to be immediate.*

- ☐ **I have set hours, and my clients know roughly when to expect me.**  
**Fix:** predictable availability reduces the always-on drain and the constant pings.
- ☐ **I don't answer every message the instant it arrives.**  
**Fix:** batching replies protects deep work — and trains expectations kindly.
- ☐ **I can tell the difference between urgent and merely loud, and respond accordingly.**  
**Fix:** triage first. Most “emergencies” can wait an hour without harm.

# Time Is the Whole Business

Every empty box above is an hour you're spending that a system could carry. You don't need to fix all of them, and you definitely don't need to fix them today. The agents who feel calm instead of frantic aren't working less — they've just stopped doing the same work twice.

## Where solo agents lose the most time

- **Repeating themselves.** The same explanation, email, and answer, rebuilt from scratch each time. Systemize it once.
- **Switching constantly.** Bouncing between tasks all day. Every switch has a cost; batching removes it.
- **Rebuilding the week.** No default structure means planning becomes its own full-time job.
- **Being always on.** Answering everything instantly feels responsive, but it quietly eats every focused hour you have.

## The rhythm that keeps time from leaking back out

### WEEKLY

Set your priorities and block income-producing work before the week fills in. Run one focused admin pass instead of touching tasks all week.

### MONTHLY

Notice which task ate the most time this month, and systemize or template it. Retire one tool or habit that isn't earning its place.

### QUARTERLY

Review your default week against how your business actually runs now. Update your templates and saved answers so they still fit.

**Systems reduce stress. Calm beats chaos.**

Find more Get Organized tools at [soloagentacademy.com](https://soloagentacademy.com)