

Step 8

Step 8a: Daily Guide

Here's a standard Daily Guide you need to do on the following days.

Mondays:

- Do [Step2a](#) - [Step2b](#)
- Go to [Clients Database](#) & review all Clients that are assigned to you
- Call Insurance leads, have [PhoneOps Listings](#) open while calling Mortgage Leads
- Follow-up with your Clients to get them to pay their invoice

Tuesdays:

- Do [Step2a](#) - [Step2b](#)
- Do follow-up calls with all Leads and current Clients
- Work with all your Clients to get the Check List cleared
- Follow-up with your Clients to get them to pay their invoice

Wednesdays:

- Do [Step2a](#) - [Step2b](#)
- Go to [Clients Database](#) & review all Clients that are assigned to you
- Do follow-up calls with all Leads and current Clients
- Work with all your Clients to get the Check List cleared
- Follow-up with your Clients to get them to pay their invoice

Thursdays:

- Do [Step2a](#) - [Step2b](#)
- Follow-up with your Clients to get them to pay their invoice
- Call Insurance leads, have [PhoneOps Listings](#) open while calling Mortgage Leads
- Work with all your Clients to get the Check List cleared

Step 8a - Continues

Fridays:

- Do [Step2a](#) - [Step2b](#)
- Follow-up with your Clients to get them to pay their invoice
- Call Insurance leads, have [PhoneOps Listings](#) open while calling Mortgage Leads

Saturdays:

- Do [Step2a](#) - [Step2b](#)
- Call Insurance leads, have [PhoneOps Listings](#) open while calling Mortgage Leads
- Follow-up with your Clients to get them to pay their invoice
- Work with all your Clients to get the Check List cleared

Sundays:

- Do [Step2a](#) - [Step2b](#)
- Follow-up with your Clients to get them to pay their invoice
- Call Insurance leads, have [PhoneOps Listings](#) open while calling Mortgage Leads

As you can see, you will be doing a lot of the same thing everyday you work. New Clients comes in everyday and their documents are also submitted daily so checking your e-mails everyday throughout the day is another important task to do.

This Completes Step 8