

BONUS PLANNER

The Weekly Performance Tracker

*A simple KPI log for response time, reply rate,
appointments booked, and hours saved*

A companion workbook to Chapter 13 of *AI Agents for Real Estate Agents*

How to Use This Tracker

Fill this in at the same time each week — a recurring 15-minute block works well for most agents. Consistency matters more than precision: a rough weekly habit beats a perfectly accurate review done sporadically.

The Four KPIs, In Short

- **Response time** — how long, on average, from a lead's inquiry to your agent's first reply.
- **Reply rate** — the percentage of leads who responded at all to your instant reply.
- **Appointments booked** — how many leads from this period booked a showing or a call.
- **Hours saved (self-estimated)** — your honest sense of hands-on time before automation vs. now.

Reading the numbers: real estate lead volume is often low week to week, so a single number can look dramatic when it isn't. Look for patterns across several weeks before adjusting anything.

MONTH 1

Weeks 1-6

Week Of	Avg. Response Time	Reply Rate	Appts. Booked	Est. Hours Saved	Notes

MONTH 2 - 3

Weeks 7-12

Week Of	Avg. Response Time	Reply Rate	Appts. Booked	Est. Hours Saved	Notes

End-of-Month Review

Use the decision framework from Chapter 13: adjust what's underperforming, pause what's causing harm, and turn off what consistently costs more than it saves.

MONTH 1

What's working — keep doing it as-is

What to adjust — one specific, testable change

What to pause or turn off, if anything

MONTH 2

What's working — keep doing it as-is

What to adjust — one specific, testable change

What to pause or turn off, if anything

MONTH 3

What's working — keep doing it as-is

What to adjust — one specific, testable change

What to pause or turn off, if anything

QUICK ACTION

-  Set a recurring 15-minute weekly slot for this tracker and put it on your calendar now.
-  At the end of each month, complete one End-of-Month Review block before moving to the next.
-  If a workflow needs adjusting, change only one thing at a time so you can tell what worked.