

The Perfect Real Estate Assistant

Session 6

Assistant Session

Schedule

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Session 6—Assistant Session: Schedule

Objectives for Today's Session

1. Develop the perfect schedule using your job description.
2. Learn the 52 tips for managing your time so you can control your day.
3. Take the Time Study to determine where you are focusing your time.
4. Utilize the Daily Meeting form to help with communication and efficiency.

Guidelines for this course:

1. Join MAPS on Facebook to stay up to date on all MAPS events and programs:
2. Only paid participants may listen and contribute.
3. To ask a question or make a comment, you may type your questions into the "Chat" Box.
4. If you would like to speak on the call, please wait until the end of the session and raise your hand. The coach will call on you when they are ready for comments.
5. Complete all assignments prior to call.
6. Be PREPARED!

Notice

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Agenda for Today's Session

Objectives for Today's Session	Page 1
Guidelines for this Program	Page 1
Get Ready!	Page 3
Develop your Perfect Schedule	Page 4
Have a Schedule: Why and How	Page 5
Sample Schedule	Page 6
Blank Schedule	Page 7
KW Executive Assistant Sample Schedule	Page 8
411	Page 9
Time Management for KW Executive Assistants	Pages 10-12
My 5 Biggest Time Robbers	Page 13
Time Study	Page 14,15
Daily Meeting/To Do	Page 16
Stay on Schedule Once and For All	Page 17
Tips for Working Remotely	Page 18,19
Have a Schedule...Even While Working from Home	Page 20,21
Head off Fatigue with Feng Shui	Page 22,23
Policy and Procedures Tab Suggestions	Page 24
What I Learned Today	Page 24
Session 6: Homework Assignment	Page 24

Get Ready!

Complete the questions on this page as a warm-up to prepare for your coaching session.

Do you have a schedule? Is it posted?

Have you modified your schedule recently?

Notes:

Develop Your Perfect Schedule

1. Get a yellow legal pad and list everything you do in the morning and everything you do in the afternoon
2. Build on your job description
3. Put in a logical order of importance
4. List your 1-time weekly, monthly, quarterly, and yearly activities
5. Schedule lunch
6. _____
7. _____
8. _____
9. _____
10. _____

Notes:

Have a Schedule: Why and How

1. Fundamental basis of time management
2. A schedule is a road map to complete tasks
3. Information on what you are going to do that day
4. Keeps you on track
5. Helps you get back on track
6. To create a schedule, list everything you do
7. Once you have your list, sort by common duties
8. Estimate time for each activity... do not underestimate, you should overestimate
9. A schedule is strong accountability for what you are to achieve each day
10. Job satisfaction
11. Be realistic
12. Be flexible ... things will come up that will require you to deviate
13. Evaluate your schedule monthly and quarterly to make sure it is realistic and includes all the important tasks
14. If it is not in the schedule, it is not important
15. Schedule all the top priorities for the morning

Keller Williams Executive Assistant—SAMPLE SCHEDULE	
Time	Activity
8:00	Prepare the call lists for the agent
8:30	Listen to voicemails and return calls
9:00	Read emails and take care of top priorities
9:15	Top Priorities: Escrow/Closing follow up Customer requests Process listings
10:00	
10:30	
11:00	Meet with agent
11:15	Handle agent request/Finish top priorities
12:00	L U N C H — You must go!
1:00	Voicemail, email, and return calls
1:30	Project time
2:00	
2:30	Return calls/Handle agent requests
3:00	Work on projects, mailings, office policy and procedures manual
3:30	
4:00	Stuff/Day recap conversation with agent (15 minutes)
4:45	Final emails, phones off, last calls out, review schedule for the next day, leave agent message, clean up office, “daily meeting” form filled out
5:00	
5:30	

Daily Schedule			
"Get Up"		12:30 pm	
Early Morning		1:00 pm	
7:00 am		1:30 pm	
7:30 am		2:00 pm	
8:00 am		2:30 pm	
8:30 am		3:00 pm	
9:00 am		3:30 pm	
9:30 am		4:00 pm	
10:00 am		4:30 pm	Meet with Agent
10:30 am		5:00 pm	
11:00 am	Meet with Agent	5:30 pm	
11:30 am		6:00 pm	
12:00 pm	Lunch	Evening	



Real Estate Executive Assistant Schedule Sample

	Monday	Tuesday	Wednesday	Thursday	Friday
8:00 AM	Check & return voicemails, emails, & text messages in order of priority	Check & return voicemails, emails, & text messages in order of priority	Check & return voicemails, emails, & text messages in order of priority	Check & return voicemails, emails, & text messages in order of priority	Check & return voicemails, emails, & text messages in order of priority
9:15 AM	Escrow follow up/ Top priorities/ Process listings/Call clients	Escrow follow up/ Top priorities/ Process listings/Call clients	Escrow follow up/ Top priorities/ Process listings/Call clients	Escrow follow up/ Top priorities/ Process listings/Call clients	Escrow Follow up/ Top priorities/ Process listings/Call clients
9:30 AM					
10:00 AM					
10:30 AM					
	Team meeting				Complete Reports: Friday, Pending, & Listing
11:00 AM	Meet with Agent/ Huddle	Meet with Agent/ Huddle	Meet with Agent/ Huddle	Meet with Agent/ Huddle	Meet with Agent/ Huddle
11:15 AM	Return voicemails & emails/Finish top priorities	Return voicemails & emails/Finish top priorities	Return voicemails & emails/Finish top priorities	Return voicemails & emails/Finish top priorities	Return voicemails & emails/Finish top priorities
11:30 AM					
11:45 AM					
12:00 PM	Lunch	Lunch	Lunch	Lunch	Lunch
12:30 PM					
1:00 PM	Return voicemails & emails	Return voicemails & emails	Return voicemails & emails	Return voicemails & emails	Return voicemails & emails
1:30 PM	Transaction management/ Listings	Transaction management/ Listings	Reviews & referrals	Transaction management/ Listings	Update leads & numbers
2:00 PM					Customer service calls/Agent update
2:30 PM	Return voicemails/ Remaining calls	Return voicemails/ Remaining calls	Return voicemails/ Remaining calls	Return voicemails/ Remaining calls	Return voicemails/ Remaining calls
3:00 PM	Work on database projects/Mailings/ P & P Manual	Work on database projects/Mailings/ P & P Manual	Work on database projects/Mailings/ P & P Manual	Work on database projects/Mailings/ P & P Manual	Work on database projects/Mailings/ P & P Manual
3:30 PM					
4:00 PM	Wrap up/Return voicemails & emails	Wrap up/Return voicemails & emails	Wrap up/Return voicemails & emails	Wrap up/Return voicemails & emails	Wrap up/Return voicemails & emails
4:30 PM	Prepare workspace for next day	Prepare workspace for next day	Prepare workspace for next day	Prepare workspace for next day	Prepare workspace for next day
5:00 PM					

My 411

The 411 stands for four weeks, one month and one year. This will be where you keep track of annual, monthly, and weekly big rocks. Analyze & choose your yearly goals, monthly goals and then what you will accomplish this week to stay on track with your month/year achievements. Review and update your 411 on a weekly basis.

My Annual Goals

Personal

- 1.
- 2.
- 3.

Business

- 1.
- 2.
- 3.

My Monthly Goals

Personal

- 1.
- 2.
- 3.

Business

- 1.
- 2.
- 3.

My Weekly Goals

Week 1

Personal

- 1.
- 2.
- 3.

Business

- 1.
- 2.
- 3.

Week 2

Personal

- 1.
- 2.
- 3.

Business

- 1.
- 2.
- 3.

Week 3

Personal

- 1.
- 2.
- 3.

Business

- 1.
- 2.
- 3.

Week 4

Personal

- 1.
- 2.
- 3.

Business

- 1.
- 2.
- 3.

Time Management for Keller Williams Executive Assistants

1. Review your schedule the day before—your next day starts then. Plan the schedule subliminally so you don't wake up anxious in the morning. This is a great stress reducer.
2. Fill out the Daily Meeting form. I suggest printing this in yellow, green, or purple. Copy it in a color you can easily find.
3. Fill out tomorrow's schedule before you leave. Schedule doing this task; 4:45 works great. Keep the schedule handy and work on it during the day. Use a clipboard so you can easily find it.
4. Bunch all return calls at one time. Do not do this activity helter-skelter. It is really a time waster.
5. Train your AGENT to not speak with you until 11:00 or until after they have completed their prospecting.
6. Schedule your lunch and take it!
7. Email whenever possible. Train your affiliates to respond and correspond by email. Remember, you are the "keeper of the gold."
8. Use color-coded files for various tasks. For example, TO READ, TO DO, TO FILE, TO ASK AGENT, TO CALL, etc.
9. Always put your personal items, keys, etc., in one place.
10. Make prelist packages in bunches of 25 or 50.
11. Have an inventory checklist. Schedule time to check it once a month. Order two office supply items at a time (for example, 2 fax cartridges). That way you never run out.
12. Have a clock on your desk to monitor your time. This also monitors time wasters.
13. DELEGATE, DELEGATE, DELEGATE. Who else can do this? What about an affiliate? Ask.
14. Touch paper only once. Real estate assistants could die of the disease of piles!
15. Shut your office door. Do not talk to other realtors/assistants in the office.

16. If off schedule, get back to it immediately where you dropped off.
17. Always leave the top of your desk clean every night. Do not walk into chaos to start the day.
18. Have buyers and sellers come to the office with paperwork and drop it off.
19. TURN THE PHONES OFF FOR ONE HOUR A DAY. YES, that's right. Do it!
20. Control your communication with your agent.
21. Control your communication with your affiliates.
22. Leave voice mails for the agent at the end of the day.
23. Turn off the phone 15-30 minutes before you leave to finish outgoing calls, and to clean office.
24. Three-tier file: 1) top tier = top priority, 2) middle tier = do today, 3) bottom tier = do sometime. Teach the agent the system.
25. Use a headset.
26. Buy the necessary supplies to make your job more efficient and productive.
27. Post your schedule.
28. Learn to INTERRUPT time wasters politely.
29. Do not give mini-seminars to other realtors and assistants in the office.
30. Place all copy jobs in a file and do it all at once so you aren't going to the copy machine every hour.
31. Speak to the agent about constant interruptions. Try having the agent log his or her questions until there are at least five, and then interrupt you. Constant agent interruptions are very costly management problems. Give them a clipboard!
32. Always meet standing up.
33. Meet with the agent twice a day. This must be pre-arranged. Be prepared with your list of questions and information. Limit the meeting to 15 minutes.
34. HONESTY will save you lots of time.

35. Do the same things at the same time every day, every week.
36. Say NO. Say THAT'S IMPOSSIBLE.
37. Always get to the point. "How can I help you? I am just stepping into a meeting."
38. Pay all bills at the same time of the month. Keep bills to be paid in the same place. Consider auto-pay for some bills.
39. Set priorities and do FIRST.
40. "Yesterday is a cancelled check. Tomorrow is a promissory note. Today is cash; spend it wisely."
41. When someone comes into your workspace uninvited, stand up and walk them to the door as you answer their question.
42. Set both short-term and long-term goals.
43. Use white boards to monitor priorities and tasks. Put end dates of projected completion. Rate in order of importance.
44. Call on escrows/sales-in-process transactions at the same time every week. Have the loan processor and escrow agents ready for your call by prearranging the time.
45. Don't be a perfectionist. This will really slow you down.
46. Set expectations with sellers and buyers regarding communication. This eliminates a lot of calls on their part.
47. Schedule project time and no interruptions. For example, Wednesday afternoons from 2-4, work on Policy and Procedures manual.
48. Check emails twice a day: once at 8:30 and again at 4:00.
49. Bunch all errands at one time.
50. Schedule a purge day each month.
51. Schedule "clean, sort, catch up" early in the morning or late one evening.
52. Always request a time for follow up with clients and affiliates.

My **5** Biggest Time Robbers

1. _____

Solution:

2. _____

Solution:

3. _____

Solution:

4. _____

Solution:

5. _____

Solution:

TIME STUDY- DETERMINE HOW YOU ARE MANAGING YOUR TIME

It is so important to know where and how to manage your time. In order for your business to succeed at the highest level, you must know where you spend your time. It is important to do this exercise following the instruction below.... otherwise you will not get the data you need.

Print the following page with the time schedule...print it on both sides with enough to last 14 days. Every 15 minutes write down the activity you are engaged in...be as specific as you can. At the end of the day, use the category codes below to label each activity. At the end of the two weeks total all the hours spent on each activity using the box below. This will give you a summary of what you are focusing on which will help you decide if you are making the best use of your time and if you need to make adjustments.

CODES

ON – working on your business with systems, training, coaching, etc

IN – working in your business with recruiting, lead generation, negotiations, appointments, etc

AD – time spent doing admin work such as email, calendar, running errands, etc

ME – time you spend caring for yourself such as the gym, meditation, walking, Dr., Dentist, etc

FF – quality time spent with family and friends

M – time spent on media....social media, tv, Netflix, sports, etc.

P – priority activities

CODE	ACTIVITY TYPE	# OF 15 MINUTE BLOCKS	TOTAL HOURS SPENT
ON	Working on your business		
IN	Working in your business		
AD	Performing administrative tasks		
ME	Self-care time		
FF	Time spent with family, friends		
M	Time spent on media		
P	Priority		
	TOTAL		

Time	Activity	Code
5:00 am		
5:15 am		
5:30 am		
5:45 am		
6:00 am		
6:15 am		
6:30 am		
6:45 am		
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Time	Activity	Code
3:00 pm		
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12:15 am		
12:30 am		
12:45 am		

Daily “To Do” and Daily Meeting: _____

Today’s to do list:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____

Follow -up from yesterday:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Ongoing tasks/projects:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Problems/Questions for Huddle:

1. _____
2. _____
3. _____
4. _____
5. _____

STAY ON SCHEDULE ONCE AND FOR ALL**1. Give What You're Doing Your Undivided Attention**

Do you log onto Facebook while you're in the middle of a project give yourself a little Pinterest break during a busy day? A sure-fire way to keep yourself on schedule is to give each item on your schedule your undivided attention.

2. Create Realistic Deadlines

Arrange tasks on your schedule according to their realistic deadlines, rather than breaking things into uniform time slots.

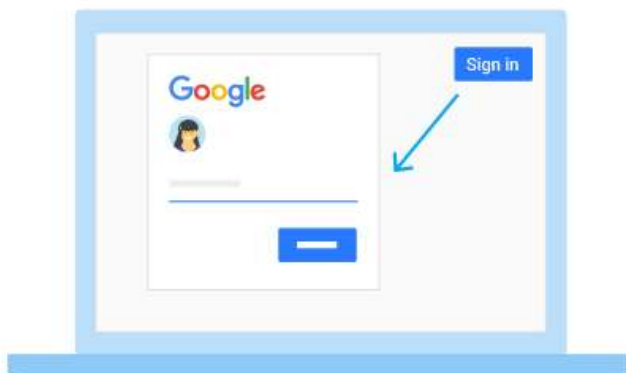
3. Train Yourself to Avoid Distractions

Commit to practicing your concentration by tuning all distractions and focusing your attention to a single task.

4. Give Your Schedule Regular Glances

A great way to keep yourself focused on your schedule is to do a regular check-in to make changes or tweak your schedule. Get in the habit of checking your schedule to see what is coming up over the next few days and/or weeks.

Daily Schedule and “To-Do” using G-Suite or another electronic schedule/calendar. Those of you that have Command, use this very valuable tool to stay on, and complete, tasks.



TIPS FOR WORKING REMOTELY

During the COVID-19 outbreak (and beyond), many companies are suggesting—even requiring—that more employees work from home; some are choosing to keep those options open. If working from home as a real estate agent or assistant is new to you, it can take some getting used to. Here are eight tips that will help you stay focused and successfully communicate with both clients and colleagues from your home office.

1) Create a Workspace

For those who are not used to working at home or who don't have an organized workstation, distractions can disrupt your productivity. Locate your workspace to a specific area in your home where you can make your space a stress-free zone of quiet and solitude where you can concentrate. If you don't have a separate room, find an area with minimum traffic flow or a corner of a room off from the main area. Do what you can to make your workspace at home as comfortable and functional as possible.

2) Create a Schedule

Set your hours as if you were in the office. Get dressed and go to the same designated place on a regular basis so your mind doesn't wander, you can focus and increase your productivity. Use Your CRM to automate your day with specific tasks or use your Daily Meeting Form to track what you've done, what you still need to do, and to note any questions you need to ask.

3) Set Boundaries Around your Worktime

When working from home, your friends and family need to know that working from home means you are still working. Discourage personal interruptions that can cause you to lose your focus, procrastinate or get behind on a deadline. It's important to let other know that although the location of your job has changed, during at-home work hours you're unavailable and cannot be interrupted.

4) Take Breaks-- ideally out of your house

If you are working where you live, it's important to get out of your workspace a few times a day. The COVID-19 outbreak makes this more challenging, but even a few breaks each day to take a walk around the block can make a huge difference to your attitude. So, if you work from home as a real estate agent or assistant, make sure to set a reminder!

5) Don't lose touch with your colleagues

If you need to connect with people at work, don't let working remotely take that away. Take advantage of the increasingly useful and innovative tools available from companies like Slack Technologies and Zoom Video Communications to interact with both individuals and groups. Be sure to let them know you are hooked up and ready to go for video calls and teleconferencing.

6) Don't lose touch with your customers

You can propose alternative opportunities such as video tours and other methods to virtually tour a property. When was last time you reached out to buyers to let them know that they could likely afford MORE house for the same monthly budget? Have you offered virtual tours? Have you engaged your social media followers in a virtual Q and A seminar? Have you created watch parties to feature different types of homes on the market?

7) Set goals – and then try to exceed them

To keep yourself motivated, it's helpful to set some goals for how much work you hope to get done in a given day. Try setting a timer and then get busy on new leads, or your next important transaction, or whatever task is at the top of your To Do list. Don't check your email, don't look at your phone or check social media until time is up. Keep records of what you do, and then see if you can top your personal best from day to day.

8) Keep a Positive Attitude

Don't let your confined circumstances affect your tranquility, happiness or productivity. Your attitude is your greatest power. Figure out what you can control and what you can't, so try to find the opportunity in a difficult situation.

HAVE A SCHEDULE EVEN WHEN WORKING FROM HOME

- **Keep a regular schedule:** Create and maintain a routine and schedule. Set up a designated space for you and each family member to work and learn. Don't forget to include periodic breaks for recharging in your schedule. Although everyone's schedule will be different, here is a sample:

7:00 am - Wake up, stretch, take care of kids/animals

7:30 am - Breakfast and family set-up

8:00 am – Return phone calls and emails

8:30 am - Work on top priorities/check on updates

11:00 am – Meet with agent

11:15 am – Return messages/make necessary call

12:00 pm - Lunch break, get fresh air, stretch & exercise

1:00 pm – Return calls/messages, check in with co-workers

2:00 pm – Handle agent requests, projects, policy & procedures manual

4:00 pm – Connect with agent

4:15 pm - Final emails, phones off, last calls out, review schedule for the next day, clean up office, "daily meeting" form filled out

5:00 pm – End of day and screen break! Call a friend, family, or loved one

7:00 pm - Self-care time

- 🕒 **Set boundaries on work schedule:** When working from home, be sure that you are working reasonable hours. Try to take several mini breaks every hour or so. It can be tempting to work more while you have your work at home, however it can also be taxing on your health and well-being, so stick to a schedule with healthy boundaries.
- **Stay connected:** Stay connected with family, friends, and support systems using technology like FaceTime, Skype, Google Hangout and other video-based options. Talk about your fears and concerns with people you trust. Chances are they are feeling the same way.
- **Keep your immune system strong:** Make a commitment to staying strong by:

- Washing your hands with soap for 20 seconds (about two rounds of the "Happy Birthday" song)
- Getting enough sleep
- Eating well and staying hydrated
- Taking vitamins
- **Prioritize personal hygiene and limit contact with others:** This is imperative to avoid spreading the virus. Here's what should be done:
 - Again, wash your hands thoroughly with soap and water for 20 seconds and use hand sanitizer regularly.
 - Disinfect with anti-bacterial wipes areas and objects that are heavily trafficked or are touched regularly where you live and work.
 - Avoid contact with those who are sick and avoid touching your face, eyes, nose, and mouth.
- **Exercise and stay active:** This is not only good for your physical health, but also your mental health. Periodically, get up and move around your home. Walking, stretching, planks or jumping jacks—whatever works best for you to reduce or alleviate stress and increase endorphins. While our favorite gyms and fitness centers are closed during this time, many are offering free livestreams or app-based workouts for members and the general public, so check online to see what's available.
- **Get fresh air:** If circumstances allow, go outside for a brisk walk and fresh air, but avoid crowds and try to maintain the recommended 6-foot distance with others.
- **Stay informed:** Knowledge is power, and it's good to stay updated on progress being made in combatting the virus. Stay informed on the latest updates from reliable sources. Avoid continuous exposure to news, media, and social media that may trigger or elevate anxiety, stress, or panic.
- **Distract and redirect:** Engage in activities that benefit your well-being, bring you joy and distract you from existing challenges. This might include meditation and yoga, often offered free online. You may also enjoy journaling, reading, art projects, cooking with new recipes, breathing exercises, or listening to a calming podcast or music.
- **Get creative to stay connected:** Share tips with co-workers and friends on what's working well for you and encourage them to do the same. Come up with new ideas like planning a Google Hangout or Zoom session to exercise together – try one-minute planks, 10 jumping jacks, or whatever you decide, just keep it simple. Share photos of pets enjoying the new routine. Watch movies at the same time while texting or on Skype or Zoom. The sky's the limit on creative ways to stay connected.

Head off Fatigue with Feng Shui

After several months of working from home, being in the same environment every day may be getting old. Feng Shui (pronounced fung shway) is an ancient Chinese practice that involves arranging objects in a way that attracts positive energy...and you don't need a lot of space. You can use it on your desk! Learn how to divide your space into separate areas, each relating to a theme, that will help effect your energy, mood, and overall productivity. Whether you call it "feng shui" or you just want to make some positive changes in your work environment, a comfortable, non-cluttered space might be what you're looking for.

Step 1: *Choose the perfect spot for your desk.* Try placing your desk at the opposite side of the room from your door so that you can see the entrance clearly. If you don't have the space or your layout doesn't work, use some strategically placed mirrors to give you a view of the entrance.

Step 2: *Clear space on your desktop.* The idea is to be able to utilize your entire desk surface and that starts with eliminating clutter. Aim to have 50% of your desktop clear. Organizing your clutter in a way that works for you is imperative. If that means brightly colored files, use them! Having more room to work in an organized and clutter free area will improve your overall creativity and productivity.

Step 3: *Arrange objects in a way that attracts good energy.* This is where you can have some fun. You may be thinking that all this feng shui stuff is silly, but practically speaking it's worth a try if it means being more organized. Be sure to arrange your items in a way that is balanced and is compatible with your workflow. Don't clutter up one side of your desk and leave the other half empty. Step back and take a look.

Step 4: *Focus on comfort.* Feng shui embraces ergonomics, which is intended to provide optimum comfort to avoid stress or injury in the workplace. If you sit behind a desk for hours at a time, proper office ergonomics — including correct chair height, adequate equipment spacing and good desk posture — can help you and your joints stay comfortable while at work.

One of the basic tools in the practice of feng shui is the Bagua Map. This nine-part grid layout allows for optimal positive energy and organization. It shows how objects should be laid out on your desk and how they correspond with different areas of your life. The map includes:

1. Abundance/Prosperity
2. Fame/Reputation
3. Love/Relationships
4. Family/ Community
5. Mind, Body, & Spirit
6. Creativity/Children
7. Wisdom/Self Awareness
8. Career/Life Purpose
9. Helpful people/Travel



Policy and Procedures Tab Suggestions

1.

2.

3.

What I Learned Today ...

Session 6: Homework Assignment - Complete and Give To Your Agent

1. _____

2. _____

3. _____