



**HWD – Brokers  
Video Script  
Back-Dated Work Plans  
04/02/2016**

(Begin at Home Page)

Hi, this is Kris Freeberg, Economist and owner of Making End\$ Meet, an Economics practice devoted to helping people plan and achieve their life's savings. Thanks for taking the time to watch this video of [the HWD productivity and project management app](#) for Real Estate Brokers. (HWD stands for How We Did, How We're Doing, and How We'll Do.)

Since here in Washington State Agents are now called "Brokers", but in most other states they're still called Agents, let me clarify what is meant here by the term "Broker."

In short, I'm keeping the old meaning. So for purposes of this presentation, "Broker" means not just a salesperson, but a **leader** who needs to supervise, coordinate, train, guide, support, and encourage **others**, not just prospect, sell, and manage their own book of business. (For those kinds of needs, [please have a look at the HWD App for Agents.](#))

I designed the HWD app for Brokers to do precisely that. Here's how it works.

(Point to Nav Bar)

As you can see from the tables here on the nav bar, the HWD App for Brokers deals with Staff, Clients, Transactions, Files related to those Transactions, Tasks, and Progress. One nice feature about this app is that you don't have to manage them separately. It brings them all together for you in some really helpful ways.

(Click on Home Page)

It all comes together here on the Home Page: Plan Your Work, and Work Your Plan.

The Plan Your Work button creates a new Task, and the Work Your Plan button creates a new Step, or a block of your day, in the Progress table when you make progress on your Tasks.

(If you've ever read Gary Keller and Jay Papasan's book [The One Thing](#), you know how important time-blocking is. One of the many advantages of the whole suite of HWD productivity and project management apps is that, by organizing Progress into Steps or blocks of time, they support and encourage this highly effective, focused, and efficient way of working.)

Speaking of focus, in this video, I'm going to focus on a really cool Task Management feature I developed from my years of military experience in both the Marine Corps and the Army.

You see, in the military we have this thing called Backward Planning. It's how World War Two was won; it's why D-Day was called D-Day. Instead of starting from the present and planning forward, like on a Gantt Chart for Project Management, you start with the objective and plan backward.

(Navigate to [Lifetime Savings Plan Page](#))

In the context of retirement planning, the objective would be when and on how much you want to retire, and you'd plan backward to determine how much to save beforehand to afford it. We do that in [the Lifetime Savings](#)

[Plan, which I offer free of charge](#), using both a [Simple](#) method, which is just a one page list of seven questions, or the [Thorough](#) method, which is a six page interview with over twenty questions.

(Back to App tab, click on Transactions Table)

In the context of a real estate transaction, the objective is obviously closing the sale. So we work off the expected Closing Date which you can see both here in the Transactions Table,

(Edit Transaction)

and here in the individual Transaction record. Notice also how in the Transaction record we have areas for File storage (collapse), Tasks, (collapse), and Progress accomplishing those Tasks (collapse). In this video we're going to focus on Tasks (expand).

As you can see here (point to Days Before column), in each Task we use Backward Planning to determine when it should be done. So for example, we're saying the Home Inspection should happen twenty days in advance of the Closing Date. Since the Closing Date is March 1, the Home Inspection Expected Date is February 10. And if I were to change the Closing Date in this transaction, the dates of all its Tasks would adjust according to the timing rules set in the Days Before or After fields.

As a real estate professional, you know that there's a lot of work that goes into a successful transaction, most of which clients neither see nor appreciate. You definitely earn your money. But most of that work is behind the scenes. Depending on its complexity, one transaction may require between ten and thirty tasks – both preparation, and follow-up.

Now, if you were only managing one transaction, all of this would be an intuitive no-brainer. But you're not, right?

To really succeed in this business, you're juggling a huge number of transactions, each with its own set of 10-30 tasks. And if you're a broker, by foreseeing needs and filling them, your job is to know what's going on so that you can support all of it, doing everything you possibly can to help your agents be successful.

The HWD App for Brokers helps you do that by easily scheduling Expected Dates for all Tasks, for all Transactions, for all Staff, and organizing them sequentially – providing, in essence, a Total Game Plan for your whole business that can then be sorted, filtered, summarized, delegated, tracked, communicated, and supported, continuously.

And what's really cool is, you don't have to figure out the prep and follow up for each Transaction. You can develop a Template, Clone it, then modify the Clone according to its own distinctions. In other words you don't have to plan new Transactions from scratch; you only need to deal with what's different about them. Here's how it works.

(Navigate to Transactions Table)

First of all, create a Template for a typical or model transaction. Here, I've named it "Triple A, Template." The Triple A is simply to keep it at the top of the list.

(Edit Transaction)

In this Transaction, you can see how it consists of a Client's name, a Description, Price, Commission, Contract Date, and Closing Date. That's it.

(Click on Tasks Table)

Once you've created a Transaction record, the next thing we do is build its Tasks, specifying when, in relation to the Closing Date, we need to get them done.

As you can see, for the sake of simple illustration I only have five Tasks for this Transaction, from scheduling a home inspection a month before, to checking in on the buyers a month after to ask how they're doing and request referrals.

Here are the Days Before or After Closing, there's the Closing Date, and there are the Expected Dates for each Task.

Notice also how we can estimate how much time each Task should take. When it's done we'll also know how long it actually took, and be able to notice the difference.

We can even automatically allocate Transaction Commission income to each Task proportionate to time. All versions of the HWD app are designed to do this, and determine Contribution Margin, which you can see is presented here by Task, and per Hour. When these Tasks are actually done over here in the Progress Table, expenses are captured and profitability is determined in all kinds of interesting and helpful ways.

Once you've built your Tasks for a typical transaction in your template, here's the really cool part: you can clone it. Watch.

1. I come over here to the Transactions table.
2. I click the Clone button.
3. Boom. See that? Now let's go the Transaction.

See there? It's called "Copy of." Now I just edit it,

Rename it, (I'll call it "Real Transaction #1), enter its particulars . . . let's say this is a half million dollar house with a \$30K commission, closing on August 1, and save it. Now watch what happens.

If I open its Tasks section, you can see all the Tasks are there, and scheduled when they should be relative to that August 1 Closing Date, and that the \$30,000 commission has been allocated to them.

This is the view of one transaction – which, as we said, if it were all you had to manage, would be a no brainer. But we're not. We want to be a busy successful business, managing hundreds of transactions, so let's go over here to the Tasks table to see how ALL our Tasks are lining up.

(Click on Tasks Table)

See there? Now Tasks for both transactions appear, sorted in sequential order by Expected Date.

Now imagine what would happen if, instead of two transactions, we had two hundred or two thousand in here. That's a very busy, profitable business with a lot going on. This can help you get there, understand & delegate your work load, and help you stay on track. It's an airtight system, totally proactive and on the ball.

There's much more. No matter how busy you get, from all of these tables, we can filter, sort, group, and summarize in both reports and charts on a dashboard that can help you keep your wits, stay on top of your game, take excellent care of your clients, and win their trust, repeat business, and referrals, sleep soundly, and relax.

That's it for this video. I just wanted to create one that focuses on the backward planning feature. For more information [please contact me](#). If you're curious about pricing [please see the links in the upper right hand corner of this web page](#), and you can also review and download the complete script of this presentation including hyperlinks over here on the right margin.

As far as price is concerned though, let me just say that it pencils. I encourage you not to worry about it. Just give it a go, and watch it work for you. I'm sure you won't look back.

Thanks for your time and attention, and I hope we can work together soon putting the HWD App to work at your business to help you minimize stress, and prosper.

'Bye for now!