Housing Specialist Daily Productivity & Caseload Planner

The Housing Specialist™ — Housing Made Possible

Privacy Note: Use approved case references or initials only. Do not enter sensitive client information.

1. Daily Priority Planner

Date: _____

Three Most Important Outcomes Today

1. _____
2. _____
3. _____

Urgent Deadlines

Item	Deadline	Action Needed

Time Blocks

Time	Focus
Morning	
Midday	
Afternoon	

2. Caseload Action Tracker

Case Reference	Current Stage	Next Action	Responsible Party	Follow-Up Date

3. Landlord Outreach Tracker

Property / Contact	Inquiry Type	Date Contacted	Response	Next Step

4. Communication and Escalation Tracker

Issue / Request	Person / Agency	Date Sent	Status	Escalation Needed?

5. End-of-Day Review

Key Accomplishments Today

1. _____
2. _____
3. _____

Unfinished Tasks (Carry Forward)

- _____
- _____
- _____

One Improvement for Tomorrow

_____
_____