

 COLDWELL BANKER | HERITAGE & LINGLE

THE IDEA BOOK

FOR NEW AGENTS



WHAT TO EXPECT

We're excited to share the TOP ideas we've gathered from the best in the industry that WILL GROW YOUR BUSINESS and/or save you time when you implement consistently.

Are you ready? Good. Let's go!

RECAP FROM Q4 2023 IDEA BOX

A review of key takeaways from your last Idea Box // pg. 3

BUILDING BETTER HABITS

Things you can be doing on a Daily / Weekly / Monthly / Yearly basis to stay in front of your sphere and grow your business // pg. 4-6

MONTHLY ACTION PLANS

January Action Plan – Creating a Strong Online Presence // pg. 8-9

February Action Plan – Perfecting Your Pitch // pg. 11-12

March Action Plan – Using Your CB Accolades to Gain Business // pg. 14-15

April Action Plan – Maximizing Your Listing Opportunities // pg. 17-18

May Action Plan – Generating Leads with Social Media // pg. 20-21

June Action Plan – Stop Being a Secret Agent // pg. 23-24

July Action Plan – Engaging with Your Online Audience // pg. 26-27

August Action Plan – Maximizing Your Opportunities with Lead Providers // pg. 29-30

September Action Plan – Developing Your Sphere // pg. 32-33

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November Action Plan – Planning for the New Year // pg. 38-39

December Action Plan – Building Routines for Scalable Success // pg. 41-42



FOR A COMPLETE LIST OF RESOURCES FROM THE IDEA BOX,
SCAN THE QR CODE! OR VISIT CBMARKETINGHUB.COM/2024IDEABOOK
(PASSWORD: *star*)



LOOKING FOR SWAG TO INCLUDE WITH YOUR POP-BY?
CHECK OUT THE LOW MINIMUM ITEMS WE'VE INCLUDED
IN OUR SWAG SHOP!

RECAP FROM Q4 2023 IDEA BOX

In an effort to help you better stay on track, we created a simple check-in to help you better understand your business, finish any outstanding 2023 marketing projects or goals, and develop your plan going forward for 2024. Simply answer the questions below to get a good idea on whether or not you used the Idea Box to its fullest!

1. Did you read the 2023 Q4 Idea Book located in your 2023 Q4 Idea Box? _____
2. Briefly recap your key takeaways from the ideas listed in the 2023 Q4 Idea Book: _____

3. Please note the initiatives you set after reading the 2023 Q4 Idea Book and the steps you took in reaching them: _____

4. Did you achieve any of the initiatives listed above? _____
5. If there were any initiatives you did not achieve, what resources could've helped you to complete them? _____

6. Are you planning to carry these initiatives over into the next quarter? _____
7. If so, briefly describe your action plan to achieve these initiatives: _____

8. Are there any resources you need to get started? Is there anything you need to do before getting started? _____

9. What help do you need from the marketing team? _____

10. Did you complete the business planning section from the December action plan in the 2022 Q4 Idea Book? _____

11. What questions or concerns do you have? _____

BUILDING BETTER HABITS

Building off our 2023 Building Better Habits checklist, we've incorporated routines from Ninja, Shawn Carpenter and Chuck Whitehead to make your routine simple!

DAILY

- ☐ GRATITUDE & AFFIRMATIONS
- ☐ LOGIN TO YOUR FACEBOOK BUSINESS PAGE

FACEBOOK 15

U PDATE YOUR STATUS
 S EE WHO MIGHT BE CELEBRATING A BIRTHDAY
 E NGAGE WITH SOMEONE WHO JUST UPDATED THEIR STATUS

 I NBOX
 T AG SOMEONE

 W HERE, WHAT, WHY?
 I NQUIRE ABOUT SOMETHING, STIMULATE A RESPONSE
 S HARE PHOTOS AND VIDEOS
 E VENTS FOR UPCOMING WEEKS
 L OOK LOCAL, WHAT'S HAPPENING AROUND YOU
 Y OU'RE A HUMAN BEING. BE AUTHENTIC, BE REAL

- ☐ LOGIN TO MLS
 - Market for Target Area
 - Review Hotsheet - identify potential opportunities for clients and farm areas

LOGIN TO YOUR CRM

☐ MOXI MORNING ROUTINE

Review Sales Flow - Review Hot List / Warm List
Identify potential clients for calls / real estate review

☐ 5 CALLS - STAY-IN-FLOW WITH SPHERE

Ron's 5 Phone Calls to Contacts, ask 5 questions
From 5 - Set-up at least 1 Real Estate Review

☐ 5 CALLS - BUYER / SELLER PROSPECTS

☐ FORD CALLS (FAMILY, OCCUPATION, RECREATION, DREAMS)

Identify potential motivators for moving:
Marriage - 28 reasons to sell
Set-up at least 2 Buyer/Prospect appointments

☐ NEW CLIENTS - 8X8 PLAN

1. Intro Call/text - 2 days after - any surprises, unmet expectations
2. Video - check-in - are they starting to get unpacked, have they met their neighbors
3. Social Media ad
4. Market Report / Add to Neighborhood News or Newsletter
5. Call/text - anything I can do for you, connect with vendors
6. Handwritten Card & Item of Value
7. Send Info Item
8. Text/Email - anything I can do for you, connect with vendors
9. Call and see how things are going
- * Note Birthday, Wish Happy Birthday
- * Note Anniversary, Wish Happy Anniversary
- * Set-up Home Visit

☐ 2 HANDWRITTEN NOTES - THANK YOU, CONGRATULATIONS, ETC.

☐ UPDATING CRM WITH CALL DETAILS, ACTIVITY & STATUS CHANGES

☐ REVIEW TO-DO'S

DID YOU KNOW?

2% OF SALES ARE MADE ON 1ST CONTACT
3% OF SALES ARE MADE ON 2ND CONTACT
5% OF SALES ARE MADE ON 3RD CONTACT

10% OF SALES ARE MADE ON 4TH CONTACT
80% OF SALES ARE MADE ON 5TH CONTACT

WEEKLY

- ☐ CREATE TIME BLOCKS FOR NEXT WEEK
Block time for customer service calls - call sellers under contract buyers, active buyers
- ☐ POST UPCOMING LISTINGS TO HOTSHEET
- ☐ SCHEDULE POST ABOUT LISTING - VIRTUAL TOUR, FEATURE OF THE HOME
- ☐ SCHEDULE POST ABOUT A CLOSING OR CLIENT TESTIMONIAL
- ☐ TAKE/SCHEDULE VIDEO THAT GIVES VALUE TO A TARGET AUDIENCE
- ☐ CRM MANAGEMENT - ADD NEW LEADS, UPDATE STATUSES
- ☐ APPOINTMENTS SET FOR WEEK TO HIT GOALS
- ☐ HAVE LUNCH OR BREAKFAST WITH A CLIENT

MONTHLY

- ☐ REVIEW / MODIFY YOUR AUTOMATED CONTENT
- ☐ HAVE LUNCH WITH COLLEAGUE OR VENDOR
- ☐ ATTEND SALES MEETING
- ☐ HOST OPEN HOUSE
- ☐ ATTEND NETWORKING EVENT
- ☐ MAILER TO FARM AREAS

YEARLY

- ☐ SET-UP MEETING WITH MANAGER TO DETERMINE GCI GOALS
- ☐ IDENTIFY 2 MARKETING IDEAS PER QUARTER
- ☐ DETERMINE NEXT STEPS FOR NEXT QUARTER'S MARKETING PLAN
- ☐ SIGN-UP FOR FARMING, IF APPLICABLE
- ☐ IDENTIFY CONTENT THEMES PER MONTH AND LIST POTENTIAL VIDEO IDEAS
- ☐ REVIEW / UPDATE CRM CONTACTS
- ☐ REVIEW/ UPDATE FARM LISTS
- ☐ UPDATE ONLINE PROFILES
- ☐ CLIENT APPRECIATION EVENT

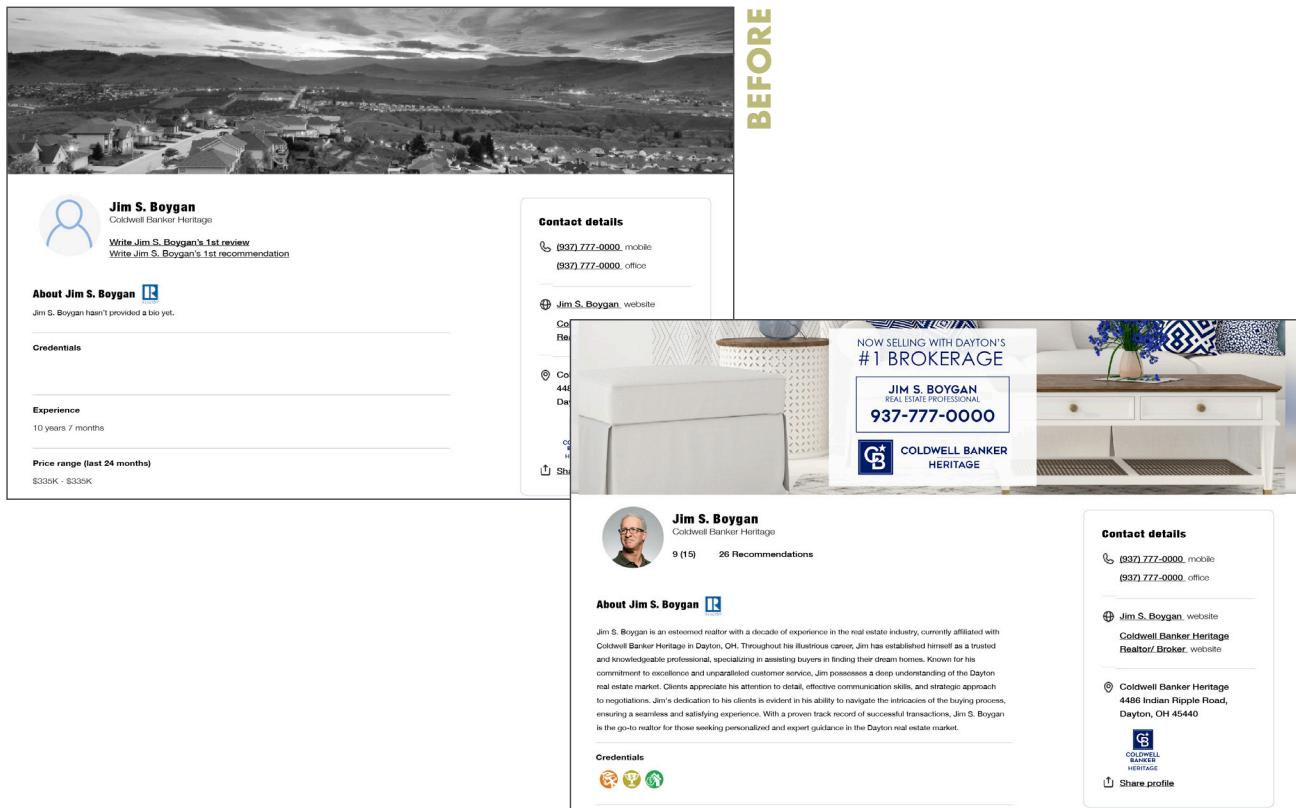


JANUARY

CREATING A STRONG ONLINE PRESENCE

WHAT YOU ARE DOING

You are going to enhance your online profile and digital presence by tailoring your biography, sharing personal stories, and showcasing your expertise. You are also ensuring your profile is error-free and maintaining a current, professional profile photo while leveraging awards and recognitions to further enhance your success and express gratitude.



WHY DO IT

Improving your online profile and digital presence is essential because statistics, such as the one from NAR 2020, reveal that over a third of buyers who utilized the internet in their real estate journey found their agent online. This underscores the significance of your online presence in connecting with prospective clients effectively and increasing your chances of securing real estate transactions.

Bio Builder

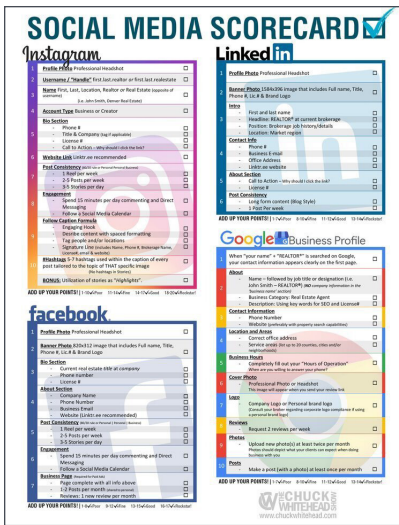
Use to craft a bio that shows your expertise, experience, and personality.



Profile Checklist

Key details to maximize your profile, utilizing our profile checklist!





HOW TO DO IT

- **Bio Builder:** Use to craft a compelling bio that highlights your expertise, experience, and personality.
- **Profile Checklist:** Ensure you have the key details to maximize your profile's visibility with our profile checklist!
- **Social Media Scorecard:** Score your social media profiles to identify what areas need improvement.
- **Professional Photo:** Take an up-to-date, professional photo and lifestyle photo-shoot.
- **Password Keeper:** Consider a password keeper, google sheet or other methods to track your password and make updates easier [IT Recommended Option: BitWarden]

Social Media Scorecard

Score your social media profiles to identify what areas need improvement.



Professional Photos - Email to Sherry

Sign-up for an up-to-date, professional photo or lifestyle photo-shoot.



JANUARY POP-BY IDEAS

New Year's Home Blessings: Create small, thoughtful gift baskets with items like candles, a mini houseplant, or a personalized "Happy New Year" card. Drop by your clients' homes to deliver these gifts and wish them a prosperous and blessed new year. This gesture shows you care and starts the year on a positive note.

Winter Warm-Up Kits: As January can be chilly in many places, consider putting together "Winter Warm-Up Kits" that include items like hot cocoa mix, cozy socks, and a branded mug. These kits are perfect for staying warm and cozy during the winter months. Clients will appreciate the thoughtful gesture.

New Year's Resolution Journals: Provide clients with custom-made journals or notebooks for them to jot down their New Year's resolutions and goals. Include a handwritten note with your best wishes and words of encouragement. This gift can be both practical and inspiring, showing that you're invested in their success.

SCRIPT FOR REACHING OUT TO CLIENTS IN JANUARY

- New Years Greeting
- Market Update
- Goal Setting

Scripts

See our available scripts.



Pop-By Guide

Learn tips and tricks to help make things easier for your next pop-by effort.



FEBRUARY

PERFECTING YOUR PITCH



WHAT YOU ARE DOING

You're preparing to refine both your pitch and process for an upcoming appointment. Recognizing the significance of first impressions, you're creating a customized, engaging presentation while also fine-tuning your approach to understand your clients' needs and communicate solutions effectively.

WHY DO IT

A well-crafted presentation sets the stage for lasting client satisfaction and referrals, distinguishing you as a trusted and effective real estate professional. It's the linchpin for building trust, establishing strong client-agent relationships, and ultimately achieving successful transactions.



Using L2L Bio Link

Centralize all of our available resources into one easy place for your clients.



RESOURCES TO DO IT

- Moxi Present
- Resume & Testimonial Templates
- Business Cards
- L2L Bio Link

Guide to Moxi Present

Use Moxi Present to create a professional, emailable presentation.



Order Business Cards

Order professionally printed business cards so clients can easily contact you.



View all Templates

Check out all templates including resume & testimonial templates!



FEBRUARY POP-BY IDEAS

Valentine's Day Treats: Create small, festive packages with Valentine's Day-themed treats like heart-shaped chocolates, cookies, or candies. Include a personalized note expressing your appreciation for their support and friendship. Deliver these sweet surprises to your clients' homes or offices to spread love and gratitude.

Home Maintenance Essentials: Assemble "Home Maintenance Essentials" packages containing practical items for home upkeep, such as furnace filters, light bulbs, or smoke detector batteries. Include a note emphasizing the importance of maintaining a safe and well-functioning home. Show your home some love.



SCRIPTS FOR REACHING OUT TO CLIENTS IN FEBRUARY

- Valentines Day Appreciation
- Winter Property Maintenance Tips
- Home Improvement Planning



MARCH

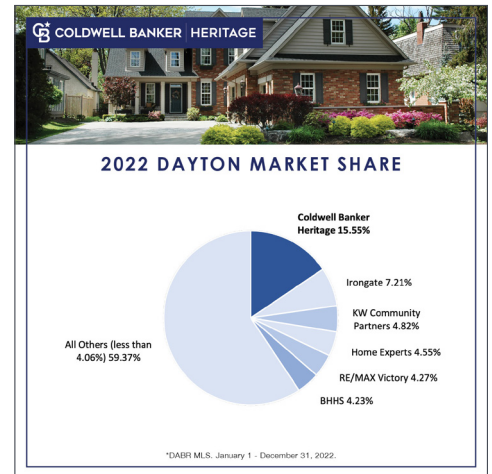
USING YOUR CB ACCOLADES TO GAIN BUSINESS

WHAT YOU ARE DOING

Promoting our market share in your target area on social media.

WHY DO IT

You are leveraging CBH's substantial market share in the area to highlight our shared achievements and expand the trust associated with the organization to you as an agent, reassuring clients of your capabilities and credibility.



RESOURCES TO DO IT

- “50 Years of Being #1” Campaign Assets
- Guide to add Custom Pages to Presentations
- Boosting on Social Media
- Marketing Center Templates

50 Years of #1 Campaign Assets

Get all the assets for the “50 Years of Being #1” Campaign.



Boosting on Social Media

Learn how to easily boost/advertise your content to expand your audience.



All Marketing Center Templates

Check out all of the templates that we have on the marketing center!



Adding Custom Pages to Presentations

How to utilize custom pages, like market shares, into your Moxi Presentation.





MARCH POP-BY IDEAS

Spring Cleaning Kit: Create “Spring Cleaning Kits” that include essential cleaning supplies, such as eco-friendly cleaning solutions, microfiber cloths, and dusting tools. Include a note with tips on getting a fresh start this spring and maintaining a clean and well-organized home.

Home Safety Check: Offer a home safety check as a pop-by service. Partner with a local home security company to provide complimentary home safety assessments. This initiative not only helps ensure your clients’ peace of mind but also demonstrates your commitment to their safety and security.

SCRIPTS FOR REACHING OUT TO CLIENTS IN MARCH

- Spring Real Estate Market
- Spring Maintenance & Renovations
- Springtime Celebrations

Scripts

See our available scripts.



Order Swag

Need swag to include with your pop-by?
Check out our swag shop!



APRIL

MAXIMIZING YOUR LISTING OPPORTUNITIES

WHAT YOU ARE DOING

You're preparing to maximize your listings to generate new business opportunities by developing your listing process and materials.

WHY DO IT

Listings are a prime opportunity to engage with potential clients, showcase your expertise, and build lasting connections, setting the stage for long-term success in the real estate business.

RESOURCES TO DO IT

- Listing Material Options
- Listing to Leads Playbooks
- Moxi Task Manager
- Social Media Ideas
- Pop-bys
- Scripts



Listing Material Options

Learn more about our listing materials to pick the best one for your property.



Listing to Lead Playbooks

Playbooks to learn how to generate leads.



Social Media Ideas

Here are a few ideas you can use to help promote your listing.



Customizing Moxi Task Manager

Find out how to customize the Moxi task manager to match your routine.





APRIL POP-BY IDEAS

Gardening Starter Sets: Put together “Gardening Starter Sets” with small potted plants, flower or herb seeds, gardening gloves, and a gardening journal. Encourage your clients to embrace the arrival of spring by starting their own garden and enjoying the outdoors. April showers may flowers.

Spring Recipe Cards: Put together a set of spring-themed recipe cards with delicious and easy-to-make dishes. Include ingredients for one of the recipes in a small basket. Clients can enjoy trying out new recipes and savoring the flavors of spring.

SCRIPTS FOR REACHING OUT IN APRIL

- Tax Season Reminders
- Earth Day Sustainability
- Upcoming Vacation Plans

Scripts

See our available scripts.



Tutorial on Pop-by Best Practices

Learn tips and tricks to help make things easier for your next pop-by effort.





MAY

GENERATING LEADS WITH SOCIAL MEDIA

Neighborhood News

The real estate market inside scoop for the community you love.

Trends in the Surrounding Market Area

Market changes in the past 12 months

Learn more

First Name

Last Name

Email

Zip Code

* All fields are required

Sign Up Now!

WHAT YOU ARE DOING

You'll be presenting two valuable resources, the Home Value Tool and Neighborhood News, to your social media audience. This will encourage them to complete a contact form, providing additional ways for you to reach out to potential leads and gauge their interest.

WHY DO IT

The Home Value Tool empowers sellers with property market insights, while Neighborhood News keeps residents updated on local events and market trends. By promoting these tools effectively, you establish yourself as a trustworthy information source, attracting informed buyers and sellers and setting yourself apart in the real estate industry. You also have the potential for gaining additional channels for reaching your clients.

COLDWELL BANKER | LINGLE

DO YOU KNOW YOUR HOME'S WORTH?

YOUR HOME MIGHT BE WORTH MORE THAN YOU THINK. SCAN HERE FOR A FREE HOME EVALUATION REPORT!



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RESOURCES TO DO IT

- Home Value Tool
- Neighborhood News
- Tips for Creating Your First Video
- Listing to Leads Content Scheduler

Home Value Tool Guide

Learn more about what the home value tool is and how to use it.



Guide - Neighborhood News

Learn how to set-up your Neighborhood News in Moxi!



Creating Your First Video

Incorporate these tips to make your video shine.



Guide: Scheduling Content in L2L

Learn how you can add and modify your social media content schedule.



MAY POP-BY IDEAS

Outdoor Adventure Kit: Create “Outdoor Adventure Kits” that include items like reusable water bottles, trail mix, and a map of local hiking or biking trails. Encourage clients to enjoy the great outdoors during the spring season and provide information on nearby outdoor destinations.

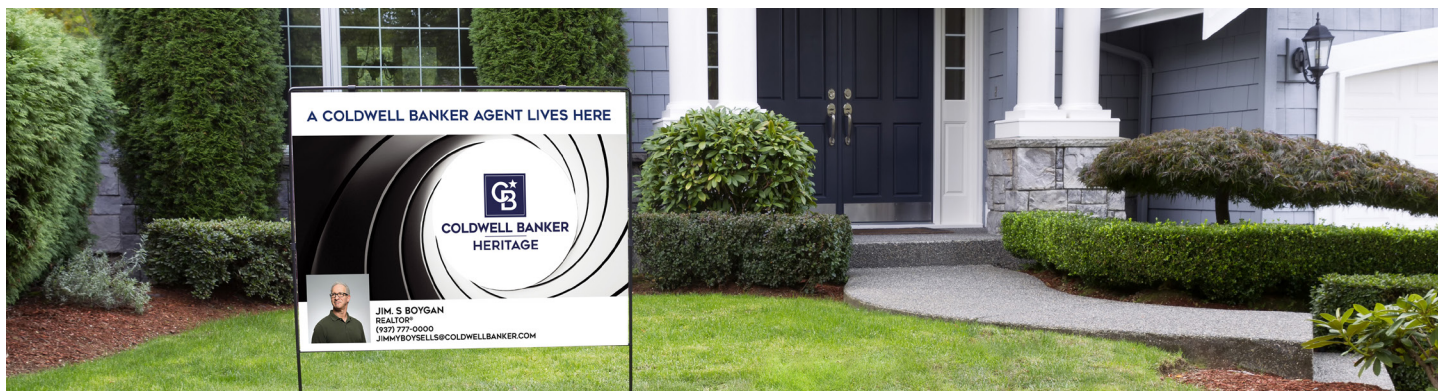
Home Energy Savings Kit: Offer a “Home Energy Savings Kit” that includes energy-efficient light bulbs, a smart thermostat guide, and tips on reducing energy consumption. Help clients make their homes more energy-efficient and eco-friendly while saving on energy costs.

SCRIPTS FOR REACHING OUT IN MAY

- Tax Season Reminders
- Earth Day Sustainability

JUNE

STOP BEING A SECRET AGENT



WHAT YOU ARE DOING

You're acquiring swag and implementing a process to consistently remind clients and make it clear that you are a realtor.

WHY DO IT

By linking your identity with real estate and Coldwell Banker, your goal is to establish a lasting impression, ensuring that when clients think about real estate, your name immediately comes to mind.



RESOURCES TO DO IT

- Car Magnet
- Yard Sign
- Tips for Perfecting Your Introduction
- CB Farming Program
- Personalized Swag
- Scripts

Order Yard Sign

Let your neighborhood know you're a realtor by ordering a personalized yard.



Order Car Magnet

Increase your brand awareness while you're driving or at the supermarket.



Sign-up for Farming

Sign-up for our CB Farming Program!



Engaging with Your Neighborhood!

Learn how to build trust and brand awareness in your neighborhood!





JUNE POP-BY IDEAS

Summer Essentials Kit: Create a summer essentials kit for your clients, including items like sunscreen, beach towels, sunglasses, and a reusable water bottle. Attach a note that says, “Stay cool this summer with these essentials, and remember, I’m here to help you find the coolest homes too!”

Backyard BBQ Pack: Put together a package of BBQ essentials, such as a set of grilling utensils, BBQ sauce, and even some gourmet burger seasoning. Include a card that reads, “Ready to fire up the grill this summer? Let’s chat about finding the perfect backyard for your BBQs!” Branded seasoning or Hot sauce, dry rub, mix some of the picnic items from JUL into this one.

SCRIPTS FOR REACHING OUT IN JUNE

- Summer Real Estate Opportunities
- Summer Renovation Projects

Scripts

See our available scripts.



Order Swag

Need swag to include with your pop-by?
Check out our swag shop!





JULY

ENGAGING WITH YOUR ONLINE AUDIENCE



WHAT YOU ARE DOING

You will be incorporating a new process into your routine, actively engaging with your clients on social media.

WHY DO IT

This proactive approach not only nurtures stronger client-agent relationships but also enhances your interaction with social media algorithms, expanding your reach and impact.



RESOURCES TO DO IT

- Building SM Engagement Ideas
- Guide: Inviting to Like
- Using Video
- Guide Customizing Content in L2L

Using Video

Learn how to generate leads with short form videos!



Guide Customizing Content in L2L

Choose the content themes that make sense for your social media audiences!



Guide: Inviting to Like

Grow your audience by asking friends, family, and clients to like your page.



Building SM Engagement Ideas

Ideas to start getting engagement on your social media.



JULY POP-BY IDEAS

Summer Fun Kit: As the summer heat kicks in, prepare and distribute “Summer Fun Kits” to your clients. Include items like sunscreen, beach towels, water bottles, and a list of local summer events. This thoughtful gift not only helps them beat the heat but also reinforces your commitment to their well-being.

Patriotic Picnic: In celebration of the Fourth of July, organize a patriotic picnic for your clients and their families. Bring along picnic baskets filled with snacks, refreshments, and red, white, and blue decorations. This event offers a fantastic opportunity to strengthen client-agent relationships while enjoying a day of outdoor fun.

Beach Day Essentials: As summer is in full swing, prepare a delightful package containing beach day essentials. Include items like sunscreen, beach towels, and even a stylish beach bag. Add a personalized note, inviting your clients to enjoy the sun and surf with these handy items.

SCRIPTS FOR REACHING OUT IN JULY

- Mid-Year Real Estate Review
- Independence Day Greetings

AUGUST

MAXIMIZING YOUR OPPORTUNITIES WITH LEADS



WHAT YOU ARE DOING

You are going to seize the opportunity when leads from third-party sources come your way by excelling in two key areas: ensuring timely and professional follow-up and providing valuable information to prospective clients.

WHY DO IT

Proactive engagement with third-party leads is essential, as these leads often have lower conversion rates.

Demonstrating your expertise, responsiveness, and commitment right from the start is crucial to capture their interest and convert them into clients successfully. Additionally, your effectiveness with current leads can open the door to more opportunities from the lead provider.

RESOURCES

- OpCity Best Practices for Leads
- Campaigns & Groups in Moxi Engage
- Lead Source Tracking in Moxi
- Scripts

realtor.com[®]
ReadyConnect Concierge





AUGUST POP-BY IDEAS

Back-to-School Supplies: As families prepare for the upcoming school year, provide a back-to-school supplies kit. Include items such as notebooks, pens, and backpacks. This thoughtful gesture not only helps parents but also shows your commitment to supporting your community.

Summer Reading Package: Put together a summer reading package with a selection of popular books, a cozy blanket, and a small reading light. Include a card that reads, “As the weather heats up, it’s a great time to relax with a good book. I’m here to help you find your perfect summer reading spot!”

OpCity Best Practices

Tips to improve your odds of getting additional and higher quality leads.



Campaigns & Groups in Moxi Engage

Use the Home Value Tool email campaign to identify leads within your sphere.



Lead Source Tracking in Moxi

Tracking lead sources, to determine what’s working and what’s not.



Scripts

See our available scripts.



SCRIPTS FOR REACHING CLIENTS IN AUGUST

- Back-to-School Assistance
- End-of-Summer Check-In



SEPTEMBER

DEVELOPING YOUR SPHERE



WHAT YOU ARE DOING

You are going to focus on expanding your contact sphere by adding 150 new contacts. Review their major life events, like marriages, births, career changes, or retirements, as these could signal an interest in real estate moves.

WHY DO IT

Building and nurturing a robust contact sphere is absolutely crucial to your success in the real estate industry. In this field, relationships are the foundation of everything. Your network and connections play a pivotal role in your ability to thrive and excel.

150 Ways to Build Your Database

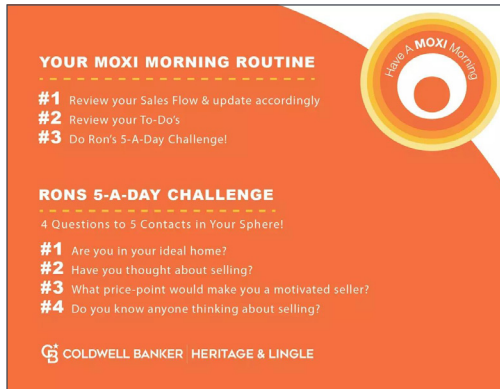
Add these 150 people to your SOI to grow your business!



28 Reasons People Move

Learn the reasons people buy and sell everyday outside of interest rates.





RESOURCES

- 28 Reasons People Move
- 150 Ways to Build Your Database
- Guide to Export LinkedIn contacts
- Ron's 5 a Day
- Invite Audience to like Social Media Pages
- Categorize Contacts
- Pop-By Tutorials
- Scripts

Export LinkedIn Contacts

Learn how you can export your LinkedIn Contacts to add to your sphere.



Ron's 5 a Day

4 Questions to identify business within your sphere!



Guide: Inviting to Like

Grow your audience by asking friends, family and clients to like your page.



Categorizing contacts

Divide your contacts for best results and easy instructions on how to do it!



Pop-By Tutorials

Learn tips and tricks to help make things easier for your next pop-by effort.



Scripts

See our available scripts.



SEPTEMBER POP-BY IDEAS

Home Safety Kits: September is National Preparedness Month. Offer your clients home safety kits that include items like flashlights, first-aid supplies, and emergency contact lists. It's a thoughtful way to promote safety and preparedness.

Pumpkin Spice Treats: Celebrate the arrival of fall with pumpkin spice-themed goodies. You can give out pumpkin spice coffee, cookies, or scented candles to bring a touch of autumn warmth to your clients' homes.

SCRIPTS FOR REACHING CLIENTS IN SEPTEMBER

- Fall Real Estate Market
- Networking and Referrals

OCTOBER

BUILDING YOUR MARKETING FUNNEL



WHAT YOU ARE DOING

You will be using the buyer and seller guides as top-of-funnel content to build your sales funnel.

WHY DO IT

By offering these comprehensive guides, you not only provide valuable information to potential clients but also capture leads and initiate the first step in the client-agent relationship. These guides serve as powerful lead magnets, helping you expand your contact sphere and establish yourself as a knowledgeable and trustworthy real estate professional.

RESOURCES

- Buyer Guide
- Seller Guide
- Listing to Leads PDF Guides
- Listing to Leads Landing Pages
- Moxi Engage Campaigns

All Templates

All templates that we have from the idea book on the marketing center!



Generating Leads from PDF Guides

Learn how to generate leads using PDF guides!



Generating Landing Page

Learn how to create your very own buyer and seller guide landing page.



Using Campaigns in Moxi

Learn how to identify what is currently running in Moxi Engage.



OCTOBER POP-BY IDEAS

Fall-Themed Home Decor: Consider gifting your clients a beautifully crafted fall wreath or a pumpkin-themed centerpiece to enhance their home's seasonal decor. These thoughtful gifts not only add a touch of warmth to their living space but also keep you top of mind as a caring and considerate agent.

Cozy Evening Package: As the weather cools down, a cozy evening package can be a delightful surprise. Include items like a scented candle, a soft throw blanket, and a set of mugs for hot cocoa or tea. Encourage your clients to relax and unwind during the autumn evenings, creating a positive association between your brand and comfort.

SCRIPTS FOR REACHING OUT IN OCTOBER

- Interest Rate Updates
- Follow-up on Previous Transactions



NOVEMBER

PLANNING FOR THE NEW YEAR



WHAT

You'll be crafting a comprehensive business, and marketing plan for the upcoming year, allowing you to approach your marketing efforts with intentionality and purpose.

WHY

Your strategic plan will serve as a roadmap, guiding your efforts and ensuring that you stay on track to achieve your business goals.

GCI Goal			
78%			
transactions	avg. size	avg. rate	avg. comm. rate
19	\$240.4K	95%	3%

Category	Closed Transactions			Details
Closed Transactions	BUYERS	SELLERS	ALL	All - Transactions Completed
Active & Pending	Transactions Completed	Transactions Completed	Transactions Completed	LISTING SIZE / COMM. / COMM. N CONTACT
Prospects	7	12	19	1896 Shady Ln \$ 234.9K / 7K / 3.0%
GCI Forecast				1254 De Quinc \$ 229K / 9.9K / 3.0%
Comparable Average				3034 DuPont \$ 537.3K / 16.1K / 3.0%
				804 N Maple A \$ 140K / 4.2K / 3.0%
				429 Florence A \$ 150K / 4.5K / 3.0%
				804 N Maple F \$ 139.9K / 4.2K / 3.0%
				5881 Mayville I \$ 155K / 4.7K / 3.0%
				1060 Grange H \$ 270K / 8.1K / 3.0%
				4567 Seville Dr \$ 223.6K / 6.7K / 3.0%
				2398 Fieldston \$ 139.7K / 4.2K / 3.0%
				1331 Pewter C \$ 475K / 14.3K / 3.0%
				3601 Benfield I \$ 224K / 6.7K / 3.0%
				1213 Georgetown \$ 135K / 4K / 3.0%
				4460 Summit F \$ 210K / 6.3K / 3.0%
				5669 Botkins R \$ 171K / 5.1K / 3.0%
				3106 Saxon \$ 224.9K / 6.7K / 3.0%
				Totals: \$ 4.6M / 137K manage

RESOURCES

- Moxi GCI Progress Tracking
- Business / Marketing Plan Excel Sheet
- CB Content Marketing Plan
- Ways to Grow Flow Chart

Business / Marketing Plan Excel Sheet

Utilize for detailed review/tracking of your business and marketing plans.



Moxi GCI Progress Tracking

Learn more about tracking GCI goals in Moxi.



CB Content Marketing Plan

CB Social Content Calendar for reminders on content to post.



Ways to Grow Flow Chart

Use this flowchart to determine potential opportunities based on your goals.



NOVEMBER POP-BY IDEAS

Thanksgiving Treats: Provide your clients with a little taste of Thanksgiving by gifting them a small package with holiday-themed treats like pumpkin spice cookies, gourmet coffee, or spiced cider mix. Include a personalized note expressing your gratitude for their continued support.

Winter Prep Kit: Put together a package with winter essentials such as hand warmers, hot cocoa mix, and cozy socks. Include a note with some tips on winterizing their homes. This practical gift shows you care about their well-being and home maintenance.

SCRIPTS FOR REACHING OUT IN NOVEMBER

- Express Gratitude
- Holiday Greetings

DECEMBER

BUILDING ROUTINES FOR SCALABLE SUCCESS



WHAT

You will establish routines to achieve consistent growth and scalability in your real estate business and translate these routines into your Moxi Engage to ensure tasks are completed.

WHY

Your routine, which includes lead generation, client engagement, and networking will streamline your operations and establish a strong foundation for business success. This dedication to routines not only empowers you to thrive in the dynamic real estate landscape and achieve your growth objectives but also ensures you consistently stay in front of clients, maintain marketing consistency, and proactively drive your marketing efforts.

Building Better Habits Checklist

Use this routine to keep you on track!



Moxi Task Manager

Customize the Moxi task manager to match your transaction routine.





RESOURCES

- Building Better Habits Checklist
- Moxi Task Manager
- Scripts
- Swag Shop

66 DAYS TO BUILDING A HABIT CHALLENGE

Get ready to skyrocket your real estate game with the **66-Day Consistency Challenge!** Choose a daily activity that aligns with your real estate goals – whether it's networking, prospecting, refining your pitch, or staying updated on market trends.



Commit to doing it every day for 66 days straight and watch your business thrive. Track your progress, learn from setbacks, and celebrate every closed deal and new connection. Share your journey with fellow agents or your accountability partner to keep the momentum going. This challenge isn't just about routine; it's about elevating your real estate career in just 66 days.

DECEMBER POP-BY IDEAS

Holiday themed swag: Holiday-themed swag adds a festive touch to your client relationships. Gifting branded items like scarves, mugs, or ornaments during the holiday season shows your appreciation and keeps you in mind for their future real estate needs. It's a simple, memorable way to spread some holiday cheer while reinforcing your professional connection.

Gingerbread House Kit: Create a charming package with gingerbread pieces, assorted candies, and icing. Include a simple instruction guide and a personal note about creating sweet memories. This engaging and thoughtful gift is perfect for clients to enjoy a festive and fun activity.

SCRIPTS FOR REACHING OUT IN DECEMBER

- New Year Preparations
- Share Year-End Market Insights
- Home Equity update

Scripts

See our available scripts.



Order Swag

Need swag to include with your pop-by?
Check out our swag shop!





