COLDWELL BANKER | HERITAGE, LINGLE, & COLLEGE REAL ESTATE

SOAR

THE IDEA BOOK

FOR EXPERIENCED 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 2024 IDEA BOOK

A review of key takeaways from your last Idea Book // 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 - Building Strong Connections With Your Sphere // pg. 8-9
February Action Plan - Showing Value to Your Existing Clients // pg. 11-12
March Action Plan - Maximizing Market Share: Your Key to More Clients // pg. 14-15
April Action Plan - Popping-by to Make Your Business Pop-off // pg. 17-18
May Action Plan - Generating Leads with Home Value Tool // pg. 20-21
June Action Plan - Leveraging Testimonials to Gain Business // pg. 23-24
July Action Plan - Generating Leads with Info Offer // pg. 26-27
August Action Plan - Engaging Your Community & Network // pg. 29-30
September Action Plan - Developing Your Business and Marketing Plan // pg. 32-33
October Action Plan - Showing Appreciation to Clients // pg. 35-36
November Action Plan - Advancing Your Path to Success // pg. 38-39
December Action Plan - Ensuring Your Systems are Working to Your Advantage // 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 2024 IDEA BOOK

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 2024 marketing projects or goals, and develop your plan going forward for 2025. 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 2024 Idea Book? _____

2. Briefly recap your key takeaways from the ideas listed in the 2024 Idea Book: _____

_____

_____

3. Please note the initiatives you set after reading the 2024 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 November action plan in the 2024 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

UPDATE YOUR STATUS
SEE WHO MIGHT BE CELEBRATING A BIRTHDAY
ENGAGE WITH SOMEONE WHO JUST UPDATED THEIR STATUS

INBOX
TAG SOMEONE

WHERE, WHAT, WHY?
INQUIRE ABOUT SOMETHING, STIMULATE A RESPONSE
SHARE PHOTOS AND VIDEOS
EVENTS FOR UPCOMING WEEKS
LOOK LOCAL, WHAT'S HAPPENING AROUND YOU
YOU'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

BUILDING STRONG CONNECTIONS WITH YOUR SPHERE

WHAT YOU ARE DOING

You will broaden your contact sphere by deepening your understanding of your existing connections to uncover potential opportunities. Your strategy will involve taking advantage of CB lead programs and applying the FORD method, along with social media intelligence, to gain deeper insights into your clients and their spheres.

WHY

Expanding your contact sphere through referrals and in-depth client knowledge is pivotal for the success of real estate agents. Building a wide network of connections not only increases your potential client base but also strengthens your credibility in the industry.

FORD Method
A method for identifying potential connections within your client sphere.

28 Reasons People Move
Learn the reasons people buy and sell everyday outside of interest rates.

FAMILY

OCCUPATION

RECREATION

DREAMS

RESOURCES

- FORD Method
- 28 Reasons People Move
- Tips for Pop-bys
- Scripts

Ron's 5 a Day
4 Questions to identify business within your sphere!

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

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.

SCRIPTS FOR REACHING OUT TO CLIENTS IN JANUARY

- New Years Greeting
- Market Update
- Goal Setting

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

Scripts
See our available scripts.

FEBRUARY

SHOWING VALUE TO YOUR EXISTING CLIENTS

WHAT YOU ARE DOING

You will demonstrate your value by offering clients equity reviews (estimates of their home's equity), real estate reviews (updates on local market conditions), or home valuations (estimations of their home's current value if listed today).

WHY

This approach not only keeps clients informed but also positions you as a trusted real estate expert, fostering stronger client-agent relationships and potentially uncovering valuable opportunities.

RESOURCES

- Moxi Present Guide
- CMA Template
- Neighborhood News Guide
- Marketing Center Guide

Moxi Present Guide
Use Moxi Present to create a professional, emailable presentation.

Templates QR
Use our CMA Template on the Marketing Center!

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

Using the Marketing Center
Looking for designs in Marketing Center? Use this guide to help make it easier!

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. Amazon List & Baskets.

SCRIPTS FOR REACHING OUT TO CLIENTS IN FEBRUARY

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

MARCH

MAXIMIZING MARKET SHARE: YOUR KEY TO MORE CLIENTS

WHAT YOU ARE DOING

You will harness the robust market share of CBHL in your target areas, alongside your own market statistics, to attract potential buyers and sellers.

WHY DO IT

You are leveraging the substantial market share in the area to highlight your 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
- Marketing Center Templates
- Boosting on Social Media
- Guide to add Custom Pages to Presentations
- Personalizable Swag
- Scripts

50 Years of #1 Campaign Assets
Get all the assets for the "50 Years of Being #1" Campaign.

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

Boosting on Social Media
Learn how to easily boost/advertise your content to expand your audience.

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

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

Scripts
See our available scripts.

APRIL

POPPING-BY TO MAKE YOUR BUSINESS POP-OFF

WHAT YOU ARE DOING

You will be doing "pop-bys." This involves personally visiting prospective clients to deliver small, thoughtful gifts or tokens of appreciation.

WHY DO IT

This approach aims to fortify your client-agent relationships, convey appreciation, and ensure that you remain at the forefront of your clients' minds.

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

Guide
Looking for designs in Marketing Center? Use this guide to help make it easier!

See 2023 Pop-By Ideas
Use our 2023 pop-by ideas!

View All Templates
Check out 2024 Marketing Center templates for pop-bys

RESOURCES TO DO IT

- Pop-by Best Practices
- 2023 Pop-By Ideas
- Marketing Center Templates
- Guide for Using Marketing Center
- Swag Shop
- Scripts

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

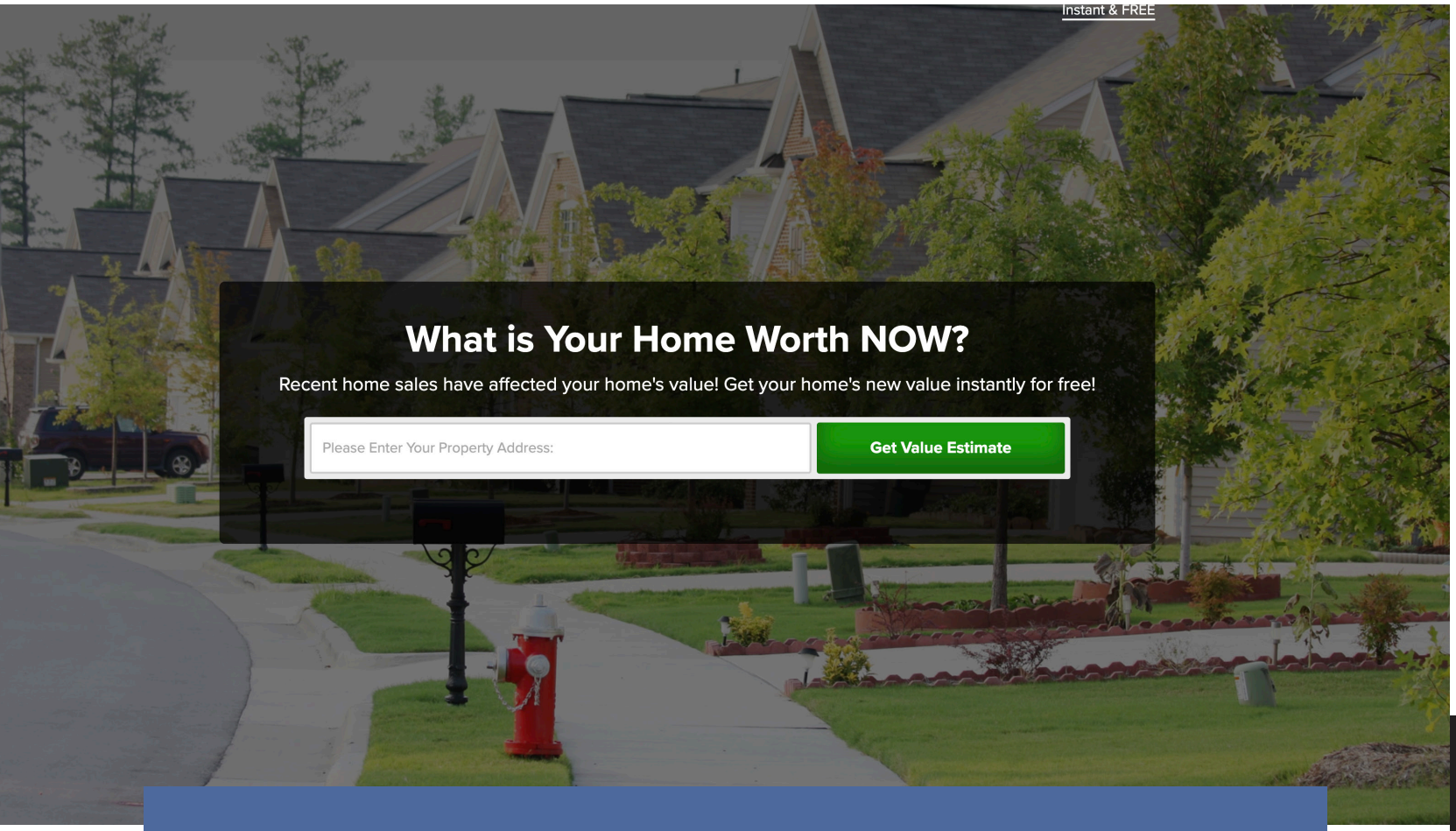
- Tax Season Reminders
- Earth Day Sustainability
- Upcoming Vacation Plans

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

Scripts
See our available scripts.

MAY

GENERATING LEADS WITH HOME VALUE TOOL



WHAT YOU ARE DOING

Capitalizing on the continued interest in home values to offer potential sellers an initial home valuation using your home value tool.

WHY DO IT

It helps to identify homeowners potentially interested in selling, and equip agents with their address and contact information for future marketing efforts.

RESOURCES TO DO IT

- Home Value Tool Guide
- L2L Landing Page Tutorial
- Previous HVT Campaign Assets
- HVT Assets to order
- Campaigns & Groups in Moxi Engage
- Guide: Home Value Tool QR Code

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

Using the Home Value Tool
Guide to help you learn more about what the home value tool is and how to use it.

L2L Landing Page Tutorial
Learn how to create your very own buyer and seller guide landing page.

Previous HVT Campaign Assets
Find previous HVT campaign assets here

Order HVT Assets
Order a Home Value Tool magnet or card!

Using Campaigns & Groups in Moxi
Identify within your sphere who might be curious about their home value..

Home Value Tool QR Code
Get Your Home Value Tool QR code in L2L

JUNE

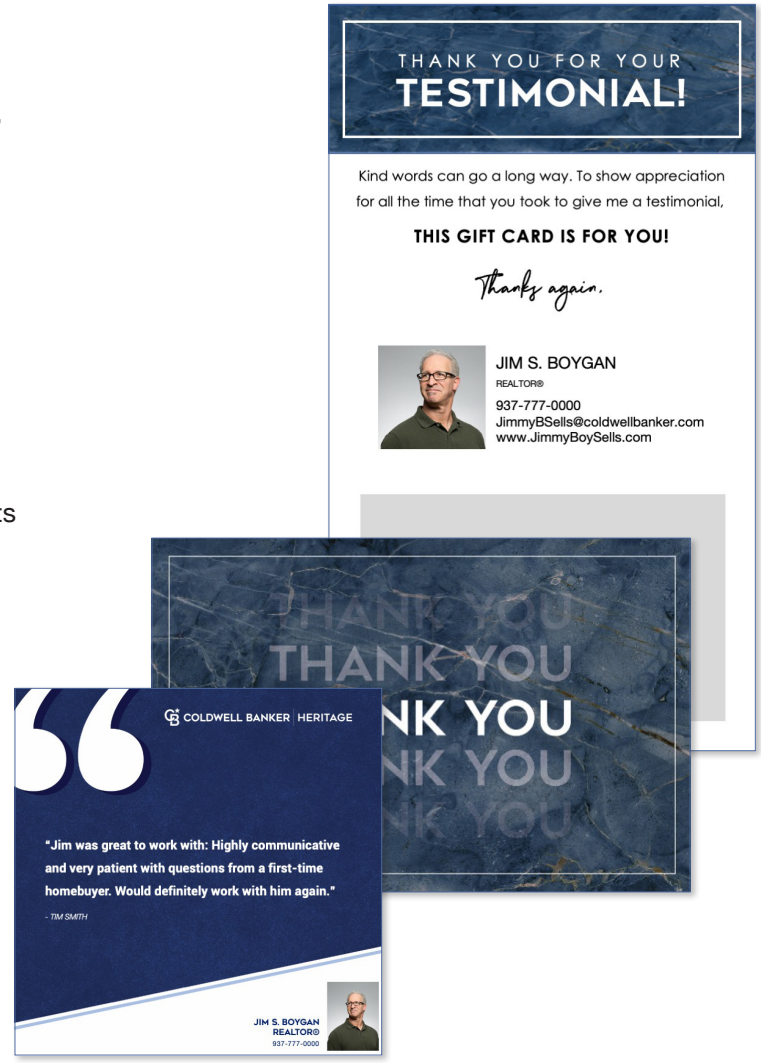
LEVERAGING TESTIMONIALS TO GAIN BUSINESS

WHAT YOU ARE DOING

You will harness the power of client testimonials to grow your real estate business. This will involve building a strong referral base from satisfied clients, implementing an effective referral ask process, and using your clients' success stories on social media.

WHY DO IT

Testimonials are invaluable for strengthening your real estate expertise because people tend to trust the opinions of others more than self-promotion. Moreover, these testimonials serve as highly shareable and engaging content that not only boosts your credibility but also extends your reach online.



Testimonial Tree Checklist
Ensure your account will automatically send an email once transaction is closed.

Best Practices for Testimonials Online
Learn some tips and tricks on posting testimonials online for the greatest reach!

Testimonial Tree Graphic
How to generate your own Testimonial Tree graphics for social media.

Marketing Center Templates Guide
Looking for templates in Marketing Center? Use this guide to make it easier!

RESOURCES TO DO IT

- Testimonial Tree Checklist
- Best Practices for Testimonials Online
- Marketing Center Templates Guide
- Testimonial Tree Graphics
- Best Practices for Pop-Bys
- Scripts

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

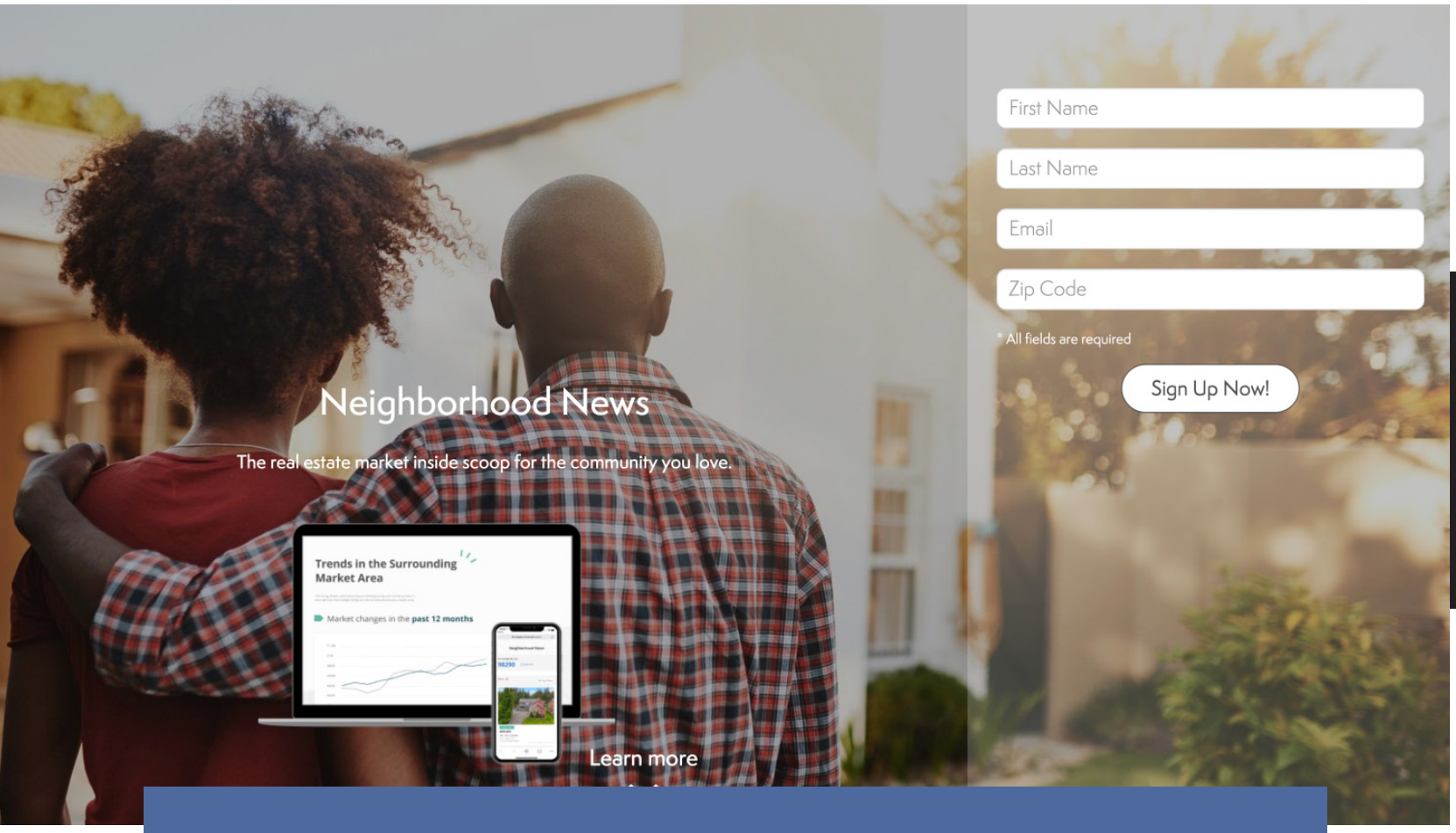
- Summer Real Estate Opportunities
- Summer Renovation Projects

Scripts
See our available scripts.

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

JULY

GENERATING LEADS WITH INFO OFFER



WHAT YOU ARE DOING

Leveraging your valuable content resources, such as Neighborhood News, Buyer & Seller Guides, and informative PDFs, to attract potential leads through your social media efforts.

WHY DO IT

This content offers value to potential buyers and sellers, while also enabling you to collect their contact information when they submit the form.

L2L Short Form Videos
Learn how to generate leads with short form videos!

L2L PDF Guides
Learn how to generate leads using PDF guides!

RESOURCES TO DO IT

- L2L PDF Guides
- L2L Short form videos
- Buyer/Seller Landing Page Assets
- L2L Landing Pages
- Marketing Center Templates
- Guide for finding content on Marketing Center

Buyer/Seller Landing Page Assets
Download these assets to use for your Buyer/Seller landing page.

Creating L2L Landing Pages
Learn how to create your very own buyer and seller guide landing page.

View All Templates
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Marketing Center Templates Guide
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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

ENGAGING YOUR COMMUNITY AND NETWORK

WHAT YOU ARE DOING

You will begin engaging with your community and expanding your network by promoting or partnering with new/favorite local businesses or vendors you work with.

WHY DO IT

This strengthens your local connections but also enhances your visibility and reputation within the community.

RESOURCES TO DO IT

- Guide for Engaging with Local Vendors
- CB-Preferred Vendor List
- Guide for Engaging with Your Neighborhood
- Guide for Engaging Online

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!”

SCRIPTS FOR REACHING CLIENTS IN AUGUST

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

CB-Preferred Vendor List
Partner with a preferred vendor from our concierge list

Guide for Engaging with Local Vendors
Check out a guide for engaging with vendors in your neighborhoods

Guide for Engaging with Your Hood
Learn how to build trust and brand awareness in your neighborhood!

Guide for Engaging Online
Ideas to start getting engagement on your social media

SEPTEMBER

DEVELOPING YOUR BUSINESS AND MARKETING PLAN

WHAT YOU ARE DOING

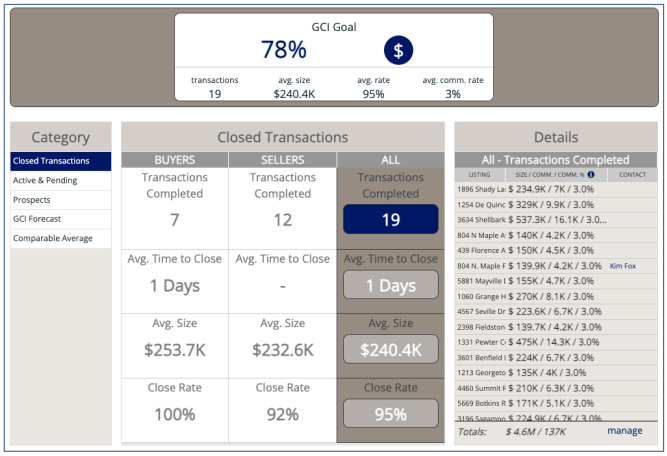
Creating a comprehensive business plan, setting GCI goals, and identifying high-level strategies to engage new leads and maintain connections with existing clients.

WHY DO IT

Setting clear GCI goals and developing a strong business plan is your blueprint for success. It helps you allocate resources, measure progress, and ensures you have a steady flow of potential business. By identifying strategies to engage new leads and nurture existing clients, you stay ahead in a competitive market, build lasting relationships, and generate more referrals and repeat business.

SMART Goal setting
Use this guide to make smart goals!

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



RESOURCES TO DO IT

- SMART Goals
- Smart Goal Setting Worksheet
- Goal Tracking in Moxi
- Business & Marketing Plan, Excel Sheets
- Ways to Grow Flowchart
- Content Marketing Plan
- CB Content Marketing Plan
- Sign-up for Farming

Goal Tracking in Moxi
Learn more about tracking GCI goals in Moxi

Business & Marketing Plan
Utilize for detailed review/tracking of your business and marketing plans.

Sign-up for Farming
Sign-up for our CB Farming Program!

CB Content Marketing Plan
Download the Social Content Calendar for reminders on content to post.

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

SHOWING APPRECIATION TO CLIENTS

WHAT YOU ARE DOING

The holidays are the ideal occasion to show gratitude to your clients. Identify ways to let them know you're thinking of them and value their business!

WHY DO IT

The holiday season is a wonderful chance to express appreciation to your clients while also maintaining a non-intrusive presence in their lives. It's a win-win – showing gratitude and staying connected with your valued clients.

RESOURCES TO DO IT

- View All - Pop-bys on Marketing Center
- View All - Client Appreciation Event Graphics on the Marketing Center
- Contact Categorization Guide
- Guide: Creating Labels with Moxi & Avery

Pop-Bys on Marketing Center
Use our 2023 pop-by ideas!

Client Appreciation Graphics
Find all client appreciation graphics on the Marketing Center.

Contact Categorization Guide
Divide your contacts for results and easy instructions on how to do it!

Creating Labels with Moxi & Avery
Learn how to Create Labels with Moxi & Avery.

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

ADVANCING YOUR PATH TO SUCCESS

WHAT YOU ARE DOING

Refining your marketing and client communication plan to ensure it is actionable and identifies clear next steps.

WHY DO IT

To streamline your marketing and communication efforts, provide more value to your clients, and ultimately set the course for a successful year ahead.

RESOURCES TO DO IT

- 8X8 New Client Follow-up Strategy
- Social Media Calendar
- CBH Created Social-Media Graphics
- Marketing Center Templates
- L2L Video Scripts
- L2L Content Scheduler

Social Media Calendar
Get ideas to help you engage and generate leads on social media.

8x8 New Client Follow-up Strategy
Use this strategy to ensure 8 touches across 8 weeks with your new clients!

Guide: Using L2L Video Scripts
scripts to help create videos to engage your social audience.

CBH Created Social-Media Graphics
Use these templates to engage with your social audience.

L2L Content Scheduler
Learn how you can add and modify your social media content schedule.

View All Templates
See all templates that we have from the idea book on the marketing center!

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.

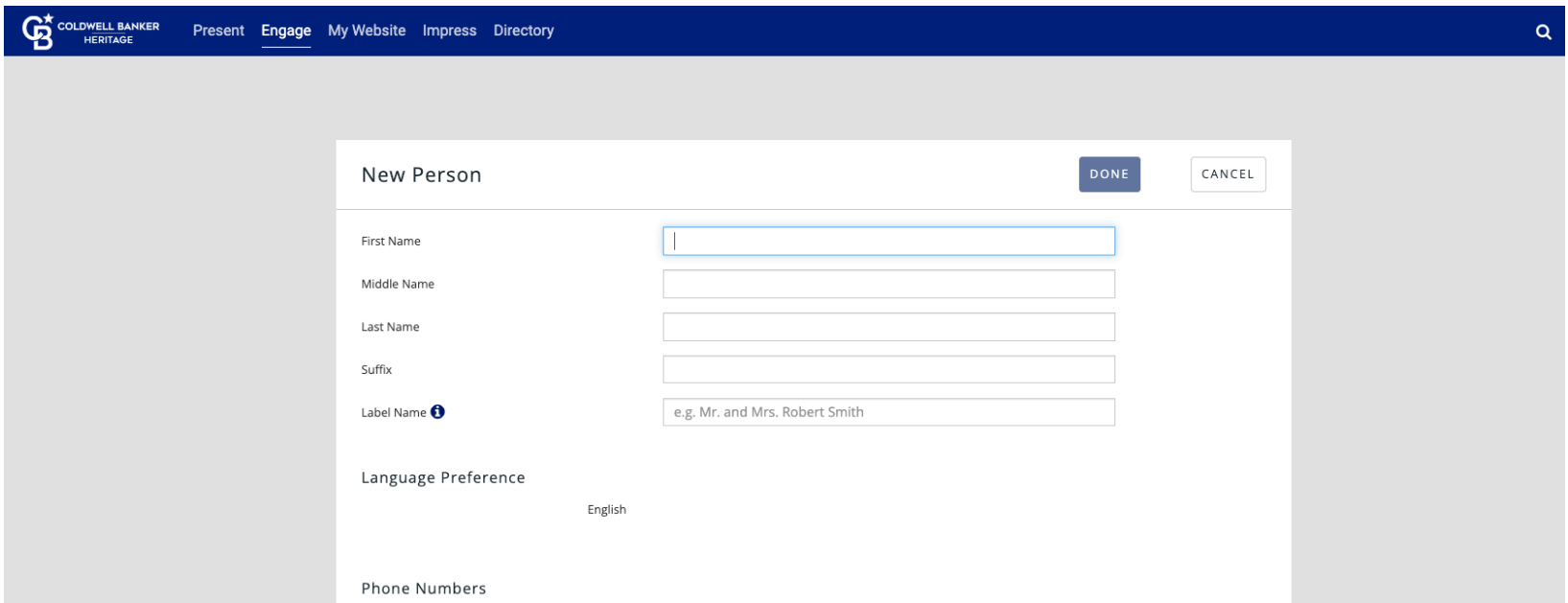
Winter Prep Kit: Put together a package with winter essentials such as hand warmers, hot cocoa mix, and cozy socks. Include a note with some tips on winterizing their homes. This practical gift shows you care about their well-being and home maintenance.

SCRIPTS FOR REACHING OUT IN NOVEMBER

- Express Gratitude
- Holiday Greetings

DECEMBER

ENSURING YOUR SYSTEMS ARE WORKING TO YOUR ADVANTAGE



WHAT YOU ARE DOING

You will refine your CRM by categorizing and updating contact statuses. Additionally, you'll review your use of subscriptions, email campaigns, direct mail, and other programs to enhance efficiency and effectiveness in your processes.

WHY DO IT

Yearly reviews of your processes and systems will keep you on the path to sustainable growth and success.

Pop-Bys on Marketing Center
Use our 2023 pop-by ideas!

Client Appreciation Graphics
Find all client appreciation graphics on the Marketing Center.

RESOURCES TO DO IT

- True Blue Toolbox
- Maximize Your Online Profiles Guide
- Social Media Scorecard
- Moxi Task Manager
- Categorizing Contact Guide
- Moxi, Campaigns - Review Subscriptions & Campaigns in Moxi in progress

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

Social Media Scorecard
Score your social media profiles to identify what areas need improvement

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

Categorizing Contact Guide
Inspiration on ways to better divide your contacts for results and easy instructions!

Moxi Campaigns
Review Subscriptions & Campaigns in Moxi in progress