



WE'RE

ALL IN!

IDEA BOOK



A YEAR-LONG GUIDE TO BUILDING A CONSISTENT, MODERN REAL ESTATE BUSINESS—ONE SMALL STEP AT A TIME.

WELCOME TO YOUR MARKETING PLAYBOOK!

This Idea Book is designed to give you a simple, structured way to grow your real estate business throughout the year. Each month focuses on a key area of marketing—your online presence, lead generation, branding, client relationships, and long-term planning. The weekly tasks are meant to be practical and manageable so you can make steady progress without needing to overhaul your entire business at once.

AI IN REAL ESTATE

Artificial Intelligence (AI) is quickly becoming one of the most useful tools available to real estate professionals. Think of it as a digital assistant that can help you write social media posts, summarize market reports, generate marketing ideas, or draft emails to clients. AI **doesn't** replace your expertise, relationships, or local knowledge—it simply helps you work faster and turn your ideas into polished content.

HOW TO USE AI THROUGH OUT THIS BOOK

Throughout this book you'll see weekly "Mastery Tasks." These activities use AI tools like ChatGPT to help you create content, brainstorm ideas, and organize your marketing. To get started, simply visit an AI platform such as ChatGPT and create a free account. Having an account allows the tool to save your conversations so you can return to past ideas, refine responses, and build on previous work as you move through the book.

If you're new to these tools, tutorials and guides are included later in each section to walk you through the process step by step!



Our AI Resources Page



Tutorials and Ideas

JANUARY - ONLINE PRESENCE



WEEK 1

GATHER AWARDS AND DESIGNATIONS TO UPDATE BIO USING AI

LEARNING GOAL

Refresh your professional identity to highlight achievements and credibility across all platforms.

MASTERY TASKS

- ☐ Gather all of your awards, designations, and certifications.
- ☐ Use AI to rewrite your bio in 3 styles: professional, conversational, and story-driven.
- ☐ Update your headshot and upload your new bio to your website, CB profile, and social media.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Happy New Year - "New Year, New Goals."		
	Post	Award/Stat Recap.		
	Post	"Meet Your Realtor" Biography.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Send New Year gratitude notes or emails — thank clients for their trust.
- Reach out to homeowners you have helped in the last year to wish them a Happy Home-iversary.
- Check in with past sellers to see if they have made any New Year's resolutions or goals.
- Offer a "Home Goal Review" — are they planning to move, refinance, or invest this year?

AI TASK OF THE WEEK

Ask AI to generate a professional, client-focused bio optimized for Realtor.com, Zillow, and Homes.com.

NOTES FOR THE WEEK

JANUARY - ONLINE PRESENCE



WEEK 2

DO AN AI/GOOGLE SEARCH

LEARNING GOAL

Evaluate and take control of how you appear online.

MASTERY TASKS

- ☐ Google yourself, your business name, and your brokerage. Record top 10 results.
- ☐ Claim or update your Google Business Profile (GBP).
- ☐ Set up Google Alerts for your name and business.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Reel	"Behind the Bio" – personal story or lesson you have learned.		
	Post	Market update template.		
	Story	Make Your Dreams Come True Day - ask clients their home goals.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Reach out to investors and landlords prepping for tax season.
- Check in with clients who bought in the last two years — offer an updated CMA.
- Contact sellers who paused last fall: "Let's talk about listing prep for spring."
- Offer a quick "Market Check-Up" call.

AI TASK OF THE WEEK

Ask AI to summarize what online search results say about "[First Name] [Last Name] Realtor."

NOTES FOR THE WEEK

JANUARY - ONLINE PRESENCE

WEEK 3

REVIEW AND UPDATE DETAILS TO CREATE OUTSTANDING PROFILES

LEARNING GOAL

Ensure every public-facing profile aligns with your brand and message.

MASTERY TASKS

- ☐ Review and update profiles on CB websites, Zillow, Realtor.com, Homes.com, Homelight, FastExpert, Bing, and Facebook.
- ☐ Review areas served, and existing info - update accordingly, add updated bio, contact info, photo, and professional links.
- ☐ Use Your Google Business Profile to Create a Bing Profile.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"Find Me Online" - follow me/like my page.		
	Reel	3 Reasons to Start Your Home Search: Less Competition, Motivated Sellers, and Faster Closings.		
	Post	Post a "Fun Fact" about one of your designations.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

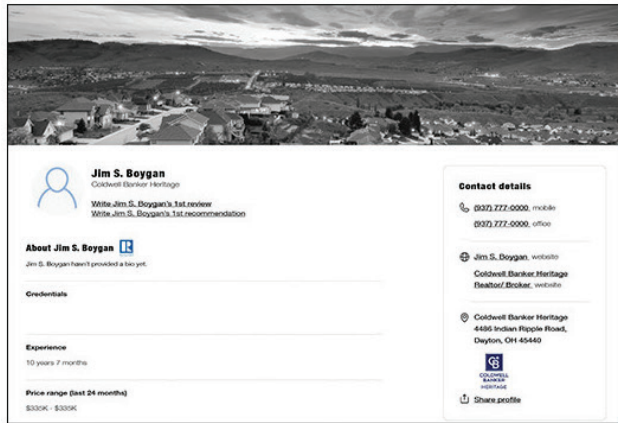
- Invite clients to follow your pages for updates and tips.
- Ask past clients to leave a review on your preferred platform.
- Check in with past buyers to see how they're settling in after the holidays.

AI TASK OF THE WEEK

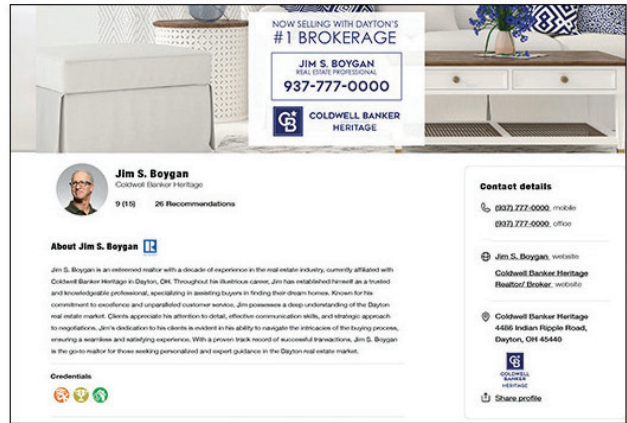
Ask AI to rate Your Realtor.com, Zillow & Homes.com profiles.

NOTES FOR THE WEEK

JANUARY - ONLINE PRESENCE



BEFORE



AFTER

WEEK 4

OPTIMIZE PROFILES FOR LEAD GENERATION

LEARNING GOAL

Maximize your online presence for lead generation.

MASTERY TASKS

- ☐ Make sure your profiles are complete across all sites - add Transactions to Zillow, add Video, add Specialties, Service Areas, and Certifications.
- ☐ Determine which profiles don't have reviews, send high-value clients a request to leave you a review with goal of getting at least one review per channel.
- ☐ Set-up auto posting for Google Business Page with Listing to Leads.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	CB Heritage Lingle College Awards.		
	Post	"Home Goals for this Year" - ask followers to share.		
	Reel	"Why I Love Helping Clients in [City]."		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Offer Free Home Equity Estimate.
- First-time buyer prep — credit refresh & goal-setting check-in.

AI TASK OF THE WEEK

Use AI to create a customized Home Equity Estimate Report for clients.

NOTES FOR THE WEEK

JANUARY CHECKLIST

WEEK 1 – GATHER AWARDS AND DESIGNATIONS TO UPDATE BIO USING AI

- ☐ Gather all of your awards, designations, and certifications.
 - ☐ Use AI to rewrite your bio in 3 styles: professional, conversational, and story-driven.
 - ☐ Update your headshot and upload your new bio to your website, CB profile, and social media.
 - ☐ Ask AI to generate a professional, client-focused bio optimized for Realtor.com, Zillow, and Homes.com.
-

WEEK 2 – DO AN AI/GOOGLE SEARCH

- ☐ Google yourself, your business name, and your brokerage. Record top 10 results.
 - ☐ Claim or update your Google Business Profile (GBP).
 - ☐ Set up Google Alerts for your name and business.
 - ☐ Ask AI to summarize what online search results say about “[First Name] [Last Name] Realtor.”
-

WEEK 3 – REVIEW AND UPDATE DETAILS TO CREATE OUTSTANDING PROFILES

- ☐ Review and update profiles on CB websites, Zillow, Realtor.com, Homes.com, Homelight, FastExpert, Bing, and Facebook.
 - ☐ Review areas served, and existing info - update accordingly, add updated bio, contact info, photo, and professional links.
 - ☐ Use Your Google Business Profile to Create a Bing Profile.
 - ☐ Ask AI to rate Your Realtor.com, Zillow & Homes.com profiles.
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WEEK 4 – OPTIMIZE PROFILES FOR LEAD GENERATION

- ☐ Make sure your profiles are complete across all sites - add Transactions to Zillow, add Video, add Specialties, Service Areas, and Certifications.
- ☐ Determine which profiles don't have reviews, send high-value clients a request to leave you a review with goal of getting at least one review per channel.
- ☐ Set-up auto posting for Google Business Page with Listing to Leads.
- ☐ Use AI to create a customized Home Equity Estimate Report for clients.

UTILIZE OUR GRAPHICS

Scan to view this month's social media graphics and share them to your social channels.



AVAILABLE TUTORIALS



BIO BUILDER

A step-by-step guide to creating or refining your professional bio for websites, social profiles, and presentations.

CREATING CANVA FOLDERS

A quick tutorial on how to create folders within Canva.

SOCIAL SCORECARD

How to review your social media performance, engagement, and posting consistency to identify what's working and what needs improvement.

PROFILE UPDATE GUIDE

How to update your profiles across Google Business, Facebook, Instagram, and real estate platforms to ensure accuracy and consistency.

THIS MONTH'S POP-BY IDEAS AND ASSETS



"NEW YEAR, FRESH START" KIT

Branded calendar or planner with a note:

"Here's to a successful year ahead – I'm here to help with your home goals."



"WARM WELCOME TO THE NEW YEAR" GIFT

Mug with cocoa packet or coffee sample:

"May your home and your cup stay full this year!"

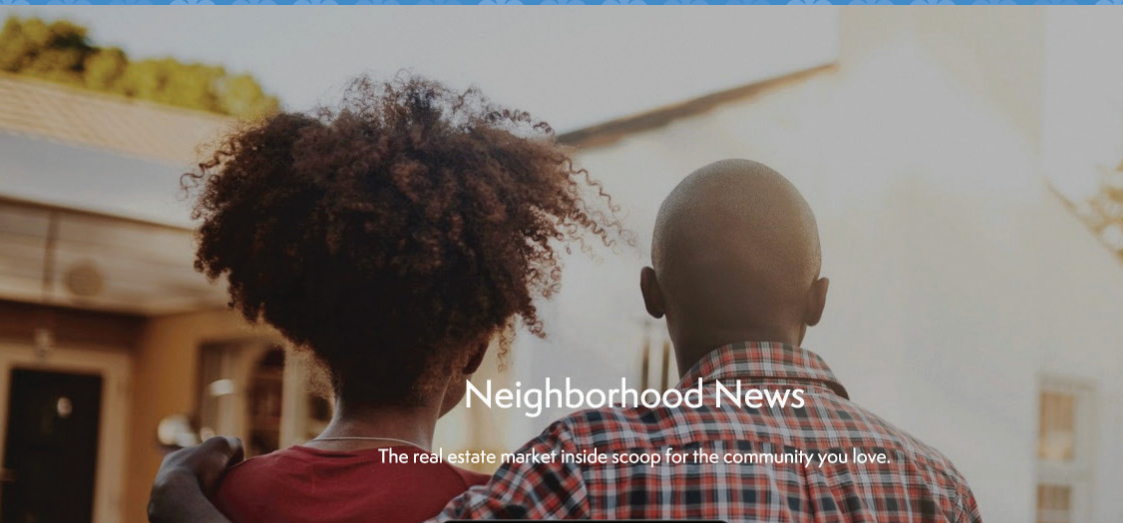


"YOUR REALTOR FOR EVERY SEASON" DROP-BY

Branded notepad and pen with a seasonal message:

"A fresh start begins with a great plan – let's make your next move part of it."

FEBRUARY - ONLINE LEAD GENERATION



* All fields are required

Sign Up Now!

WEEK 1

OPEN HOUSE, HOME VALUE, MOVE METER®, OR NEIGHBORHOOD NEWS

LEARNING GOAL

Choose one lead-generation campaign type to focus on and commit to driving traffic toward it all month.

MASTERY TASKS

- ☐ Select your campaign type (Open House, Home Value, Move Meter®, or Neighborhood News).
- ☐ Determine the messaging for your campaign.
- ☐ Create a Landing Page with Listing to Leads.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Client Testimonials.		
	Story	Highlight Black Leaders in your community for Black History Month.		
	Post	Share Open House round up post from local CB FB Pages.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

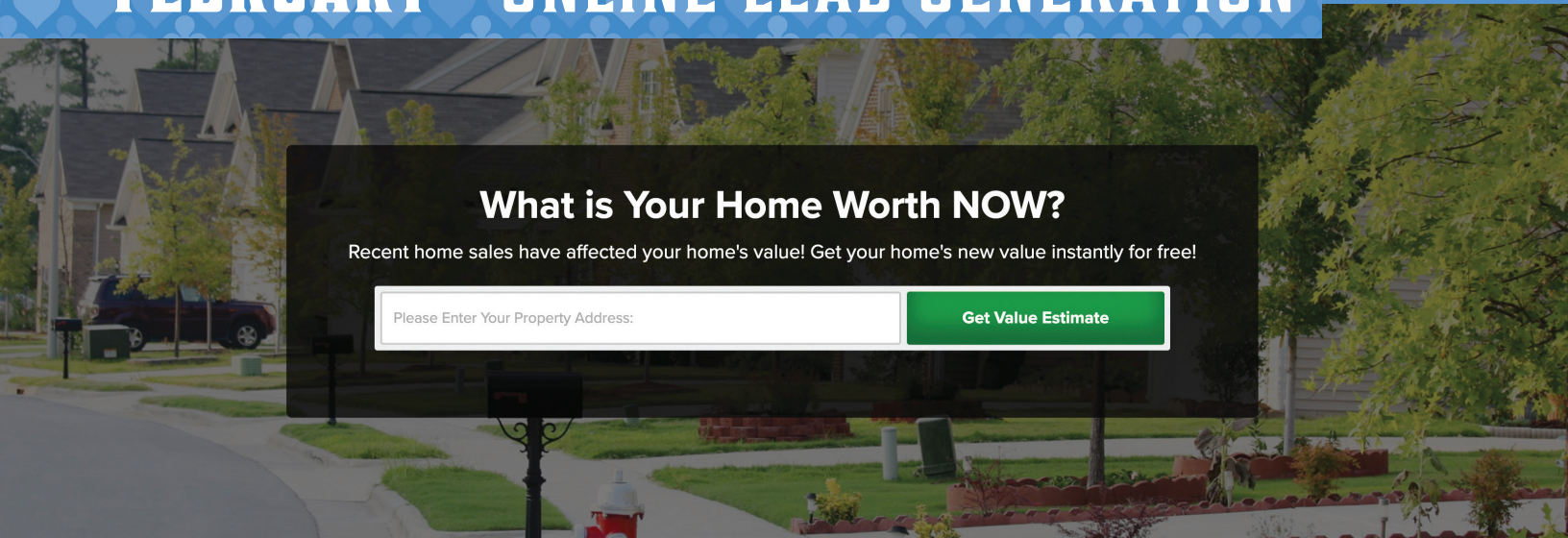
- Offer a complimentary “Neighborhood Market Snapshot.”
- Share a “Thinking of Moving This Spring?” message with local homeowners.
- Reconnect with past sellers to ask whether they’ve made upgrades that could impact their home’s value.

AI TASK OF THE WEEK

Ask AI to write three ad captions for your chosen campaign: one conversational, one educational, and one curiosity-based.

NOTES FOR THE WEEK

FEBRUARY - ONLINE LEAD GENERATION



WEEK 2

GENERATE LANDING PAGE & GRAPHICS

LEARNING GOAL

Build a branded landing page and design coordinating graphics for use across all platforms.

MASTERY TASKS

- ☐ Test your campaign landing page to understand how it works.
- ☐ Design a Canva template to promote your offer.
- ☐ Use Canva to resize to multiple size formats: Square, Vertical, and Story.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Story	Random Acts of Kindness Day - Share a story about something thoughtful somebody else has done for you.		
	Post	Happy Valentine's Day - Looking for the Perfect Home Match?		
	Post	CB National Awards/OAR awards.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Send emails titled "Curious What Homes Are Selling For in Your Neighborhood?"
- Offer relocation guidance for anyone planning a spring or summer move.
- During Valentine's week, reach out to past clients: "Have you fallen in love with your home all over again, or are you ready for a new match?"

AI TASK OF THE WEEK

Ask AI to analyze your campaign goal and audience, then generate clear, client-focused messaging for your campaign and landing page.

NOTES FOR THE WEEK

FEBRUARY - ONLINE LEAD GENERATION



WEEK 3

POST TO SOCIAL MEDIA AND ADD TO CONTENT LIBRARY

LEARNING GOAL

Distribute your campaign content across multiple platforms for maximum reach.

MASTERY TASKS

- ☐ Connect your social pages to the Listing to Leads Social Content Calendar.
- ☐ Post your graphics and landing page links on Facebook, Instagram, and your Google Business Profile.
- ☐ Save your campaign assets—copy, links, and graphics—to your Content Library for easy reuse.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Reel	CB Quotables.		
	Post	Client Testimonials.		
	Post	"Live Well with Coldwell" Campaign.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Mid-month check-in: "Thinking about listing in March or April? Now's the time to prepare."
- Follow up with everyone who engaged with your landing page and offer a personal consultation.
- Send a "Your Home's Love Language" message tied to the features clients value most.
- Share current market trends or a Neighborhood News update.

AI TASK OF THE WEEK

Ask AI to draft social post captions with built-in engagement prompts (polls, comments, or "DM me for more info" hooks).

NOTES FOR THE WEEK

FEBRUARY - ONLINE LEAD GENERATION



WEEK 4

CREATE A REEL & BOOST

LEARNING GOAL

Convert engagement into leads through boosted content and short-form video.

MASTERY TASKS

- ☐ Ask AI to create a short video script for your campaign.
- ☐ Record a 15–30 second Reel introducing your campaign and call to action, then add captions and your landing page link in the description.
- ☐ Boost or advertise the Reel.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Reel	"3 reasons people are moving in this year." (Voiceover).		
	Post	"Thinking about listing this spring? Let's get you ready early."		
	Post	Energy Saving Tips.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Send a “Spring Prep” checklist to potential sellers.
- Text recent homeowners: “Curious what your home is worth in today’s market?”
- Reconnect with renters who are preparing to buy this year.

AI TASK OF THE WEEK

Ask AI to create a short video script and ad copy for your boosted Reel, including an attention-grabbing hook, clear talking points, and a strong call to action.

NOTES FOR THE WEEK

FEBRUARY CHECKLIST

WEEK 1 – OPEN HOUSE, HOME VALUE, MOVE METER®, OR NEIGHBORHOOD NEWS

- ☐ Select your campaign type (Open House, Home Value, Move Meter®, or Neighborhood News).
 - ☐ Determine the messaging for your campaign.
 - ☐ Create a Landing Page with Listing to Leads.
 - ☐ Ask AI to write three ad captions for your chosen campaign: one conversational, one educational, and one curiosity-based.
-

WEEK 2 – GENERATE LANDING PAGE & GRAPHICS

- ☐ Test your campaign landing page to understand how it works.
 - ☐ Design a Canva template to promote your offer.
 - ☐ Use Canva to resize to multiple size formats: Square, Vertical, Story.
 - ☐ Ask AI to analyze your campaign goal and audience, then generate clear, client-focused messaging for your campaign and landing page.
-

WEEK 3 – POST TO SOCIAL MEDIA AND ADD TO CONTENT LIBRARY

- ☐ Connect your social pages to the Listing to Leads Social Content Calendar.
 - ☐ Post your graphics and landing page links on Facebook, Instagram, and your Google Business Profile.
 - ☐ Save your campaign assets—copy, links, and graphics—to your Content Library for easy reuse.
 - ☐ Ask AI to draft social post captions with built-in engagement prompts (polls, comments, or “DM me for more info” hooks).
-

WEEK 4 – CREATE A REEL & BOOST

- ☐ Ask AI to create a short video script for your campaign.
- ☐ Record a 15–30 second Reel introducing your campaign and call to action, then add captions and your landing page link in the description.
- ☐ Boost or advertise the Reel.
- ☐ Ask AI to create a short video script and ad copy for your boosted Reel, including an attention-grabbing hook, clear talking points, and a strong call to action.

UTILIZE OUR GRAPHICS

Scan to view this month's social media graphics and share them to your social channels.



AVAILABLE TUTORIALS



HOW TO CREATE A LANDING PAGE IN LISTING TO LEADS

Build pages with forms that automatically sync new contacts to your CRM.

RUNNING AN AD CAMPAIGN IN LISTING TO LEADS

A step-by-step walkthrough on how to run your ads using listing to leads.

INTRODUCING CANVA FOR CB

How to access & utilize your CB Canva Account.

THIS MONTH'S POP-BY IDEAS AND ASSETS



WE GO TOGETHER LIKE HOME & HEART

Valentine's candy or cookie enclosed with a tag:
"Thinking about a move? Let's find your perfect match!"



YOUR HOME'S TRUE LOVE STORY

Valentine's Card personalized with a QR code to your Home Value Page:
"Every home has a love story — find out what yours is worth today."



KEYS TO MY HEART

Small branded key chain or house-shaped stress ball:
"Your next home could be the key to your heart — let's start your search!"

MARCH - CANVA PERSONALIZATION



WEEK 1

GATHER BRAND ASSETS

LEARNING GOAL

Centralize your branding assets to ensure every design you create is consistent and ready to use.

MASTERY TASKS

- ☐ Download your professional headshot, company logos, and QR codes.
- ☐ Remove the background from your headshot using Canva.
- ☐ Gather past client reviews and testimonials from Google, Zillow, Facebook, or email into a document to reference for future marketing.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Story	Women's History Month / International Women's Day — highlight an influential woman in history.		
	Post	"Live Well with Coldwell" Campaign.		
	Post	Highlight a trusted vendor for a spring project.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

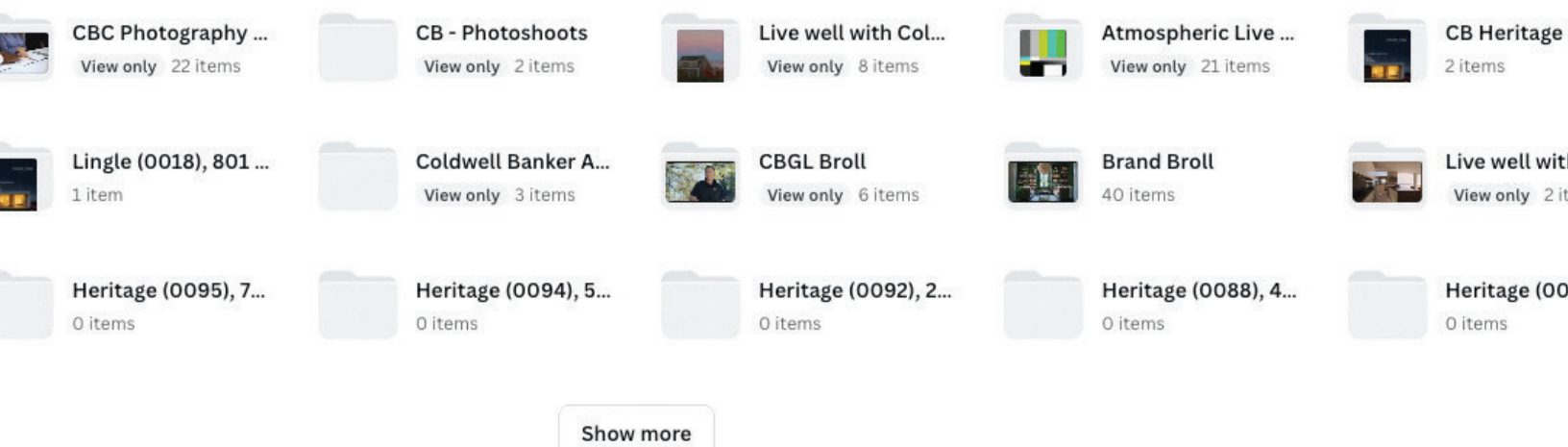
- Reach out to homeowners preparing for spring listings and offer a "Marketing Refresh Consultation."
- Send a note: "Spring is coming – time to show off your home in its best light!"
- Check in with local business owners about collaborating on community events.

AI TASK OF THE WEEK

Ask AI to generate branded stock images that match your visual style and marketing goals.

NOTES FOR THE WEEK

MARCH - CANVA PERSONALIZATION



WEEK 2

CREATE FOLDERS FOR GRAPHICS

LEARNING GOAL

Organize Canva so every graphic and template has a home and you can design efficiently all year.

MASTERY TASKS

- ☐ Create main folders in Canva labeled: Listings, Testimonials, Holidays, Lead Magnets, and Agent Branding.
- ☐ Add any existing templates/designs to the appropriate folders. Add downloaded assets to your Agent Branding Folder.
- ☐ Create a list of templates that still need to be built, including: Just Listed, Just Sold, Open House, Market Update, Testimonial Post, Holiday Graphic, Buyer Tip/Seller Tip, and Agent Spotlight/About Me.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Client Testimonials.		
	Post	Buyer Value - Professional Guidance.		
	Story	Local St. Patrick's Day Events.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

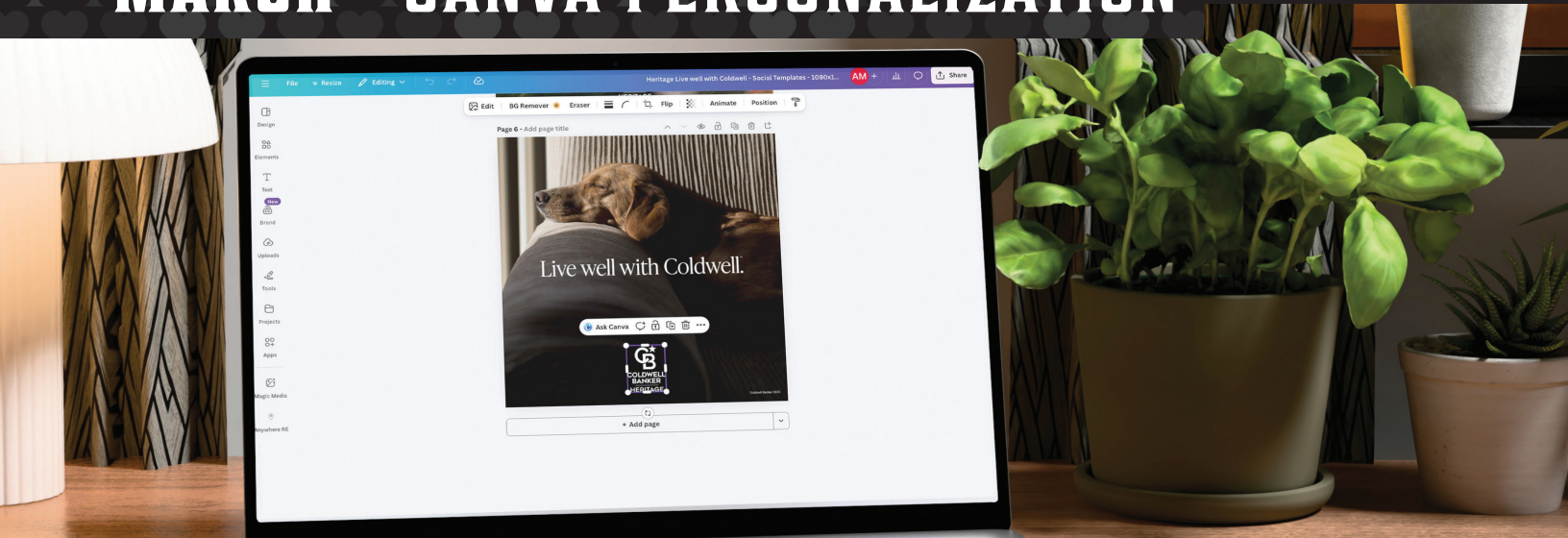
- Offer to feature clients' renovation stories or projects in your social content.
- Check in with homeowners about listing timing ahead of the busy season.
- Invite clients to an upcoming event or a lunch or dinner meeting.

AI TASK OF THE WEEK

Ask AI to create a list of tips for buyers or sellers, selecting a specific client type or demographic for personalization.

NOTES FOR THE WEEK

MARCH - CANVA PERSONALIZATION



WEEK 3

FIND A CB TEMPLATE & PERSONALIZE IT

LEARNING GOAL

Start with Canva by personalizing Coldwell Banker templates to match your brand identity.

MASTERY TASKS

- ☐ Browse Coldwell Banker templates in Canva, identifying any that fit your list of needed templates.
- ☐ Select one design (listing, testimonial, or announcement).
- ☐ Add your photo, name, and contact details to brand it as your own.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Story	Women's History Month.		
	Post	"Live Well with Coldwell" Campaign.		
	Reel	CB Quotables.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

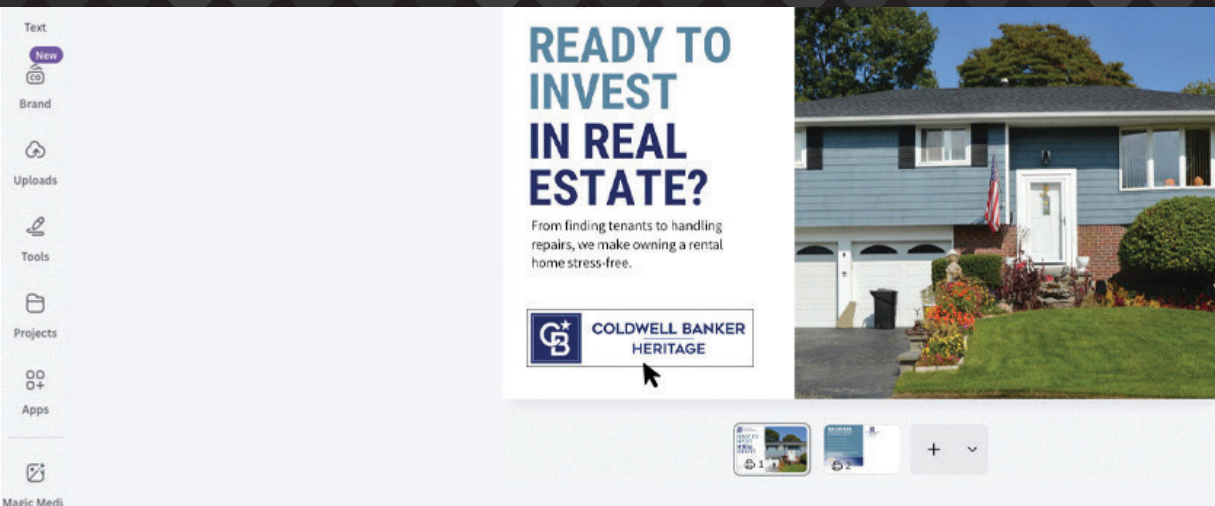
- Send “Spring Selling Prep” checklist to potential sellers.
- Check in with past buyers — see if they're ready to invest or move up this year.
- Offer to design a complimentary “Just Listed” social post for clients planning to sell soon.

AI TASK OF THE WEEK

Use AI to draft compelling social media copy for the CB Quotables.

NOTES FOR THE WEEK

MARCH - CANVA PERSONALIZATION



WEEK 4

CREATE/DESIGNATE TEMPLATES AND STORE IN FOLDERS

LEARNING GOAL

Finalize your marketing system by saving reusable templates and creating a ready-to-use library.

MASTERY TASKS

- ☐ Create versions of your core templates (Just Listed, Just Sold, Open House, etc.) for easy copy and paste.
- ☐ Name each template clearly for easy identification.
- ☐ Store each template in the corresponding folders.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Client Testimonials.		
	Reel	What you can expect this spring in the housing market.		
	Post	Lead Magnet — Considering a move in [your area]? Share your experience with a post and story.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Send "Spring Market Update".
- Reach out to clients who listed last spring and ask how their first year has gone.

AI TASK OF THE WEEK

Ask AI to create a compelling lead magnet tailored to your audience, campaign goal, and local market.

NOTES FOR THE WEEK

MARCH CHECKLIST

WEEK 1 – GATHER BRAND ASSETS

- ☐ Download your professional headshot, company logos, and QR codes.
 - ☐ Remove the background from your headshot using Canva.
 - ☐ Gather past client reviews and testimonials from Google, Zillow, Facebook, or email into a document to reference for future marketing.
 - ☐ Ask AI to generate branded stock images that match your visual style and marketing goals.
-

WEEK 2 – CREATE FOLDERS FOR GRAPHICS

- ☐ Create main folders in Canva labeled: Listings, Testimonials, Holidays, Lead Magnets, and Agent Branding.
 - ☐ Add any existing templates/designs to the appropriate folders. Add downloaded assets to your Agent Branding Folder.
 - ☐ Create a list of templates that still need to be built, including: Just Listed, Just Sold, Open House, Market Update, Testimonial Post, Holiday Graphic, Buyer Tip/Seller Tip, and Agent Spotlight/About Me.
 - ☐ Ask AI to create a list of tips for buyers or sellers, selecting a specific client type or demographic for personalization.
-

WEEK 3 – FIND A CB TEMPLATE & PERSONALIZE IT

- ☐ Browse Coldwell Banker templates in Canva, identifying any that fit your list of needed templates.
 - ☐ Select one design (listing, testimonial, or announcement).
 - ☐ Add your photo, name, and contact details to brand it as your own.
 - ☐ Use AI to draft compelling social media copy for the CB Quotables.
-

WEEK 4 – CREATE/DESIGNATE TEMPLATES AND STORE IN FOLDERS

- ☐ Create versions of your core templates (Just Listed, Just Sold, Open House, etc.) for easy copy and paste.
- ☐ Name each template clearly for easy identification.
- ☐ Store each template in the corresponding folders.
- ☐ Ask AI to create a compelling lead magnet tailored to your audience, campaign goal, and local market.

UTILIZE OUR GRAPHICS

Scan to view this month's social media graphics and share them to your social channels.



AVAILABLE TUTORIALS



REMOVING BACKGROUNDS FROM HEADSHOTS IN CANVA

Prepare clean, professional headshots for all branded materials.

BUILDING A CONTENT LIBRARY FROM CANVA DESIGNS

Export, name, and store your templates properly for future use.

THIS MONTH'S POP-BY IDEAS AND ASSETS



FRESH LOOK FOR SPRING

Mini microfiber cloth with branded sticker:

*"Spring is a great time for fresh starts — including your home goals.
I'm always here when you're ready!"*



LUCKY TO HAVE YOUR REFERRALS

Branded Shamrock or Lottery Ticket:

"Lucky to You & Your Referrals"



YOUR REALTOR FOR EVERY SEASON

Polaroid-style magnet frame or small photo magnet:

"Homes tell stories — and I'd love to help with your next chapter."

APRIL - OPTIMIZING YOUR SELLER PRESENTATION

Save Share Download

Customize reports to rearrange sections or add/remove elements within a section.

Reset

Cover Page 1/1

☒ Report Cover

[Edit Cover →](#)

Property Summary 5/7

Property Information 8/19

Maps 0/2

Seller Report

COLDWELL BANKER HERITAGE

WEEK 1

CREATE RPR® SELLER'S REPORT

LEARNING GOAL

Build a strong foundation for your seller presentation by preparing an accurate, data-driven RPR® Seller's Report.

MASTERY TASKS

- ☐ Log in to RPR® and generate a Seller's Report for a recent or upcoming listing.
- ☐ Review market trends, comparable properties, and local statistics for accuracy.
- ☐ Highlight the key visuals and metrics you will include in your presentation, such as pricing, market activity, and days on market.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Reel	"3 Things I Review Before Pricing a Home."		
	Story	Easter/Spring Wishes for Clients.		
	Post	CB Quotables.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Reach out to homeowners who listed last spring — offer an updated market analysis.
- Email your sphere: "Curious what your home could sell for this spring? I'll prepare a free market report."

AI TASK OF THE WEEK

Ask AI to summarize your RPR® report into a clear, client-friendly paragraph for your listing presentation.

NOTES FOR THE WEEK

APRIL - OPTIMIZING YOUR SELLER PRESENTATION



WEEK 2

GATHER UPDATED BIO & TESTIMONIALS

LEARNING GOAL

Create a Resume & Testimonial One-Sheet for listing presentation.

MASTERY TASKS

- ☐ Add your designations, awards, and achievements to your bio.
- ☐ Gather three new buyer and three new seller testimonials from recent transactions.
- ☐ Select your strongest quotes to include in your presentation.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"Meet Your Agent" — updated bio post with a friendly photo.		
	Post	"Grateful for My Clients" post featuring one standout review.		
	Story	Share the Importance of Fair Housing Month.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Reach out to clients from the past 12 months asking for quick reviews or feedback.
- Send a “Spring Market Update” email and include a review request link.
- Follow up with satisfied clients to request a video testimonial.

AI TASK OF THE WEEK

Ask AI to pull measurable outcomes from your reviews, such as sale price, days on market, or negotiation wins.

NOTES FOR THE WEEK

APRIL - OPTIMIZING YOUR SELLER PRESENTATION



WEEK 3

CUSTOMIZE RESUME & SUPPORTING MATERIALS

LEARNING GOAL

Update your supporting documents to strengthen your listing presentation package.

MASTERY TASKS

- ☐ Update and format your professional resume to reflect your experience, sales achievements, and specialties.
- ☐ Refresh your testimonial sheet with updated client quotes. Identify and gather three to five helpful informational pieces to include such as a Selling Process Overview, Preparing Your Home to Sell Checklist, Marketing Strategy Flyer, Sample Selling Timeline, and FAQ Sheet.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Reel	"What Makes My Listing Process Different".		
	Post	"Preparing to Sell?" — carousel or checklist post.		
	Post	"Best Week to List" — share a post explaining that national data shows this is the best week of the year to put a home on the market (Mid to Late April).		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Offer to walk clients through “What to Expect When Selling This Spring.”
- Contact past sellers — ask if they'd like a refreshed market estimate.
- Share a “Home Prep for Maximum Value” checklist by email.

AI TASK OF THE WEEK

Ask AI to create a short “Quote of the Week” video series using the CB Quotables, and schedule the first three videos for social media.

NOTES FOR THE WEEK

APRIL - OPTIMIZING YOUR SELLER PRESENTATION



WEEK 4

CREATE DIGITAL & PRINT VERSIONS OF PRESENTATION

LEARNING GOAL

Pull everything together into a polished, on-brand seller presentation ready to use digitally or in person.

MASTERY TASKS

- ☐ Combine your RPR® report, bio, testimonials, and marketing materials into a single digital presentation (Canva, PDF, or MoxiPresent®).
- ☐ Design a matching print version with consistent branding.
- ☐ Save both versions in your Content Library and on your device for easy access.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Reel	"Preparing for Listing Appointments Like a Pro."		
	Story	Share the Importance of Fair Housing Month.		
	Post	"Know Your Market" - local housing trends.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Spring Refresh Home Audit" Offer - Message or email past clients to offer a complimentary 10-minute home audit—a quick conversation about improvements, staging, or curb appeal updates that could help if they decide to sell this year.
- "Your Home's Story Update" Check-In - Reach out to homeowners who have been in their home for three to five years to see whether their needs have changed or if their equity position could make a move possible.

AI TASK OF THE WEEK

Ask AI to run a mock listing presentation interview and provide feedback on your responses.

NOTES FOR THE WEEK

APRIL CHECKLIST

WEEK 1 – CREATE RPR® SELLER'S REPORT

- ☐ Log in to RPR® and generate a Seller's Report for a recent or upcoming listing.
 - ☐ Review market trends, comparable properties, and local statistics for accuracy.
 - ☐ Highlight the key visuals and metrics you will include in your presentation, such as pricing, market activity, and days on market.
 - ☐ Ask AI to summarize your report into a clear, client-friendly paragraph for your listing presentation.
-

WEEK 2 – GATHER UPDATED BIO & TESTIMONIALS

- ☐ Add your designations, awards, and achievements to your bio.
 - ☐ Gather three new buyer and three new seller testimonials from recent transactions.
 - ☐ Select your strongest quotes to include in your presentation.
 - ☐ Ask AI to pull outcomes from your reviews, such as sale price, days on market, or negotiation wins.
-

WEEK 3 – CUSTOMIZE RESUME & SUPPORTING MATERIALS

- ☐ Update and format your professional resume to reflect your experience, sales achievements, and specialties.
 - ☐ Refresh your testimonial sheet with updated client quotes. Identify and gather three to five helpful informational pieces to include such as a Selling Process Overview, Preparing Your Home to Sell Checklist, Marketing Strategy Flyer, Sample Selling Timeline, and FAQ Sheet.
 - ☐ Ask AI to create a short "Quote of the Week" video series using the CB Quotables, and schedule the first three videos for social media.
-

WEEK 4 – CREATE DIGITAL & PRINT VERSIONS OF PRESENTATION

- ☐ Combine your RPR® report, bio, testimonials, and marketing materials into a single digital presentation (Canva, PDF, or MoxiPresent®).
- ☐ Design a matching print version with consistent branding.
- ☐ Save both versions in your Content Library and on your device for easy access.
- ☐ Ask AI to run a mock listing presentation interview and provide feedback on your responses.

UTILIZE OUR GRAPHICS

Scan to view this month's social media graphics and share them to your social channels.



AVAILABLE TUTORIALS



RPR® SELLER'S REPORT WALKTHROUGH

Learn how to generate a professional Seller's Report and export visuals for listing presentations.

CREATING A RESUME & TESTIMONIAL ONE-SHEET IN CANVA

Format a clean, printable agent one-sheet and insert testimonials to build credibility.

BUILDING A LISTING PRESENTATION IN MOXIPRESENT®

Combine your RPR® report, bio, and testimonials, then export versions for in-person meetings, email, and iPad use.

THIS MONTH'S POP-BY IDEAS AND ASSETS



SPRING HOME PREP KIT

Branded Compressed Sponge:

"It's officially spring! Hope this helps with the spring cleaning – and if selling your home is on your to-do list this season, I'm here to help."



FIND A NEW NEST

Nest-shaped jar opener:

"A little helper for your current nest – and when it's time to open the door to your next one, I'm here to make that easy too."



BEST TIME TO SELL

Branded Poncho Ball Key chain or Poncho:

"April showers are here – and so are serious buyers. Thinking about selling? April is one of the strongest months to list."

MAY - COMMUNITY MARKET HIGHLIGHTS



WEEK 1

PICK THREE CITIES TO HIGHLIGHT & DO A NEIGHBORHOOD SPOTLIGHT

LEARNING GOAL

Select three key markets or neighborhoods to focus on this month, and begin collecting the local data, visuals, and stories you will use in your marketing.

MASTERY TASKS

- ☐ Choose three cities or neighborhoods you actively serve or want to grow your business in.
- ☐ Research local highlights, including schools, parks, businesses, and recent housing trends.
- ☐ Gather visuals—such as photos, maps, or community images—and client stories for each area.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Story	Happy New Homeowners Day.		
	Post	"Spotlight on [City Name]" post featuring a fun fact or popular local landmark.		
	Reel	"Why I Love [Neighborhood Name]."		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Reach out to your first-time homebuyers on New Homeowners Day to see how they are enjoying their new home.
- Message clients who live in your featured areas: "I'm highlighting your neighborhood this month—are there any local businesses you love that I should feature?"
- Send a text to your clients, who are mothers, for Mother's Day.

AI TASK OF THE WEEK

Ask AI to create social media content for upcoming local events in your target area.

NOTES FOR THE WEEK

MAY - COMMUNITY MARKET HIGHLIGHTS



WEEK 2

CREATE REPORTS, SCRIPTS & MARKET BUZZ TEMPLATE

LEARNING GOAL

Develop your local market reports and messaging so you can easily promote your chosen areas across all channels.

MASTERY TASKS

- ☐ Use RPR®, Market Quest, or MLS data with ChatGPT to create a custom market report for your three chosen cities.
- ☐ Write or record short scripts summarizing key statistics, such as average price, days on market, and current trends.
- ☐ Design a "Market Buzz" social media template in Canva and store all assets in an accessible folder, such as your Content Library.(Google Drive or Content Library).

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Create a Thank You for Mothers and Mother Figures on your FB Page for Mother's Day.		
	Reel	"What's the market doing in [City Name]?"		
	Story	"How [City Name] stacks up against nearby markets." Use the Move Meter to compare 2 areas.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Send your updated market reports to homeowners in each focus area.
- Email past buyers: "Here's how your neighborhood is performing this month."
- Offer a "City Snapshot" or Home Value Estimate for interested clients.

AI TASK OF THE WEEK

Ask AI to write short 15-second scripts summarizing each city's report for use in Reels or Stories.

NOTES FOR THE WEEK

MAY - COMMUNITY MARKET HIGHLIGHTS



WEEK 3

GENERATE A LANDING PAGE AND BLOG

LEARNING GOAL

Create a digital hub for your community highlights that drives engagement and captures leads.

MASTERY TASKS

- ☐ Build a landing page for each of your three communities to allow leads to download the reports.
- ☐ Add a blog post to your website highlighting key insights from the reports. Share only a teaser and include a clear call to action inviting readers to request a personalized market report or consultation.
- ☐ Identify content opportunities and local partners who could add value to your blog or reports, such as businesses offering discounts, information, or community updates.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"New on the Blog" post linking to your report landing page.		
	Post	"Discover [City Name]" — link to your blog with an image of the neighborhood.		
	Reel	Home Buying and Selling Lead Generation - Your Home's Value.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

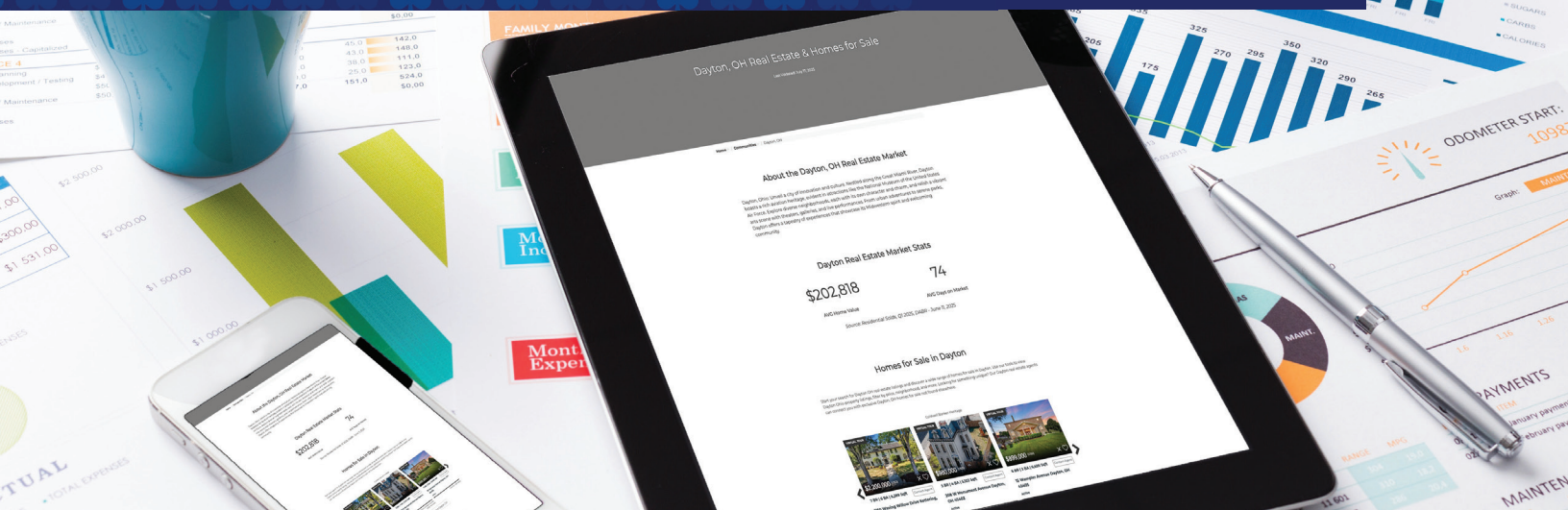
- Email your database: "I've just published updated local market reports —see what's happening near you."
- Share your blog with relocation clients or those exploring new areas.
- Send your blog and report to anyone who contributed to neighborhood highlights for that community.

AI TASK OF THE WEEK

Ask AI to write a short Reel script for each community market report, highlighting key stats and a clear call to action.

NOTES FOR THE WEEK

MAY - COMMUNITY MARKET HIGHLIGHTS



WEEK 4

CREATE STORY, POST, AND ADD TO CONTENT LIBRARY

LEARNING GOAL

Distribute your content across platforms, maximize visibility, and ensure it's saved for reuse.

MASTERY TASKS

- ☐ Post your community highlights and reports on Facebook, Instagram, and your Google Business Profile.
- ☐ Turn your best-performing post into a Story or short Reel with a clear call to action.
- ☐ Save all assets—graphics, captions, reports, and links—to your Content Library for future use.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"How's the Market?" recap post for all 3 cities.		
	Story	"Swipe Up for Your City's Report."		
	Reel	"Download Your Free Market Report."		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Follow up with anyone who engages with your posts and offer a personalized update.
- Send your report link to homeowners in each focus area.
- Reach out to local businesses featured in your spotlights to tag or thank them.

AI TASK OF THE WEEK

Ask AI to generate high-engagement captions and hashtags for Facebook and Instagram for your Market Buzz campaign.

NOTES FOR THE WEEK

MAY CHECKLIST

WEEK 1 – PICK THREE CITIES TO HIGHLIGHT & DO A NEIGHBORHOOD SPOTLIGHT

- ☐ Choose three cities or neighborhoods you actively serve or want to grow your business in.
 - ☐ Research local highlights, including schools, parks, businesses, and recent housing trends.
 - ☐ Gather visuals—such as photos, maps, or community images—and client stories for each area.
 - ☐ Ask AI to create social media content for upcoming local events in your target area.
-

WEEK 2 – CREATE REPORTS, SCRIPTS & MARKET BUZZ TEMPLATE

- ☐ Use RPR®, Market Quest, or MLS data with ChatGPT to create a custom market report for your three chosen cities.
 - ☐ Write or record short scripts summarizing key statistics, such as average price, DOM, and current trends.
 - ☐ Design a “Market Buzz” social media template in Canva and store all assets in an accessible folder, such as your Content Library.(Google Drive or Content Library).
 - ☐ Ask AI to write short 15-second scripts summarizing each city’s report for use in Reels or Stories.
-

WEEK 3 – GENERATE A LANDING PAGE AND BLOG

- ☐ Build a landing page for each of your three communities to allow leads to download the reports.
 - ☐ Add a blog post to your website highlighting key insights from the reports. Share only a teaser and include a clear call to action inviting readers to request a personalized market report or consultation.
 - ☐ Identify content opportunities and local partners who could add value to your blog or reports, such as businesses offering discounts, information, or community updates.
 - ☐ Ask AI to write a short Reel script for each market report, highlighting key stats and a clear call to action.
-

WEEK 4 – CREATE STORY, POST, AND ADD TO CONTENT LIBRARY

- ☐ Post your community highlights and reports on Facebook, Instagram, and your Google Business Profile.
- ☐ Turn your best-performing post into a Story or short Reel with a clear call to action.
- ☐ Save all assets—graphics, captions, reports, and links—to your Content Library for future use.
- ☐ Ask AI to generate captions and hashtags for Facebook and Instagram for your Market Buzz campaign.

UTILIZE OUR GRAPHICS

Scan to view this month's social media graphics and share them to your social channels.



AVAILABLE TUTORIALS



RPR® MARKET REPORT BASICS

How to navigate and use RPR®'s built-in tools to create market reports.

CREATING CANVA TEMPLATES FOR NEIGHBORHOOD SPOTLIGHTS

How to build Canva templates to highlight communities and neighborhoods.

BUILDING LANDING PAGES IN MOXIWEBSITES®

How to create and edit landing pages in Moxi.

HOW TO TURN BLOG CONTENT INTO REELS

How to repurpose company blog content into Reels and Stories for social media.

THIS MONTH'S POP-BY IDEAS AND ASSETS



HOME SAFETY REMINDER

Pack of batteries for smoke detectors:

"A quick home safety reminder — it's always a good time to check your smoke alarm batteries. Keeping your home and family safe is what matters most."



FOR THE MOMS WHO MAKE IT HOME

Mini flower pot for Mother's Day:

"Just a little something to celebrate the amazing moms who make every house a home."



A SWEET THANK YOU, NEIGHBOR

Treat bag with a locally made baked good or snack:

"Supporting local and sharing a little joy — thank you for being part of this community!"

JUNE - REVIEWS & REPUTATION



WEEK 1

ADD NEW CLIENTS TO CRM & GROUPS

LEARNING GOAL

Organize all client data so your contacts are complete, accurate, and segmented for future marketing.

MASTERY TASKS

- ☐ Export your sales from your MLS or board system by searching "Sold" under your name as the agent. Download the results as a CSV or Excel file. If you belong to multiple boards, repeat this process for each one to ensure you capture every closed transaction for the year.
- ☐ Combine all sales into one spreadsheet and add columns for First Name, Last Name, Email, Phone, and Category.
- ☐ Categorize each contact (for example: Buyer, Seller, and Past Client), separating multiple categories with commas.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	National Homeownership Month- "Grateful for My Clients."		
	Story	Behind-the-scenes photo while updating your client list.		
	Post	Is Now the Right Time to Sell?		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Reach out to sellers who do not have updated mailing information to refresh your database.
- Text past clients to let them know they will soon receive a review request and how much their feedback means.
- Contact a client with a unique home story and ask for permission to share it on social media.

AI TASK OF THE WEEK

Ask AI to organize your CRM contact notes into clear follow-up categories:
Review Needed, Referral Source, and Active Contact.

NOTES FOR THE WEEK

JUNE - REVIEWS & REPUTATION



WEEK 2

REVIEW WHO HAS SUBMITTED REVIEWS & SEND REQUESTS

LEARNING GOAL

Increase your online visibility and reputation by collecting reviews from clients who haven't submitted yet.

MASTERY TASKS

- ☐ Run a check to see who has already left reviews on Google, Zillow, Realtor.com, Homes.com and Facebook. Identify clients who have not yet left a review and within the Categories column in your contact spreadsheet, add additional groups called "Has Left Review" or "Hasn't Submitted Review."
- ☐ Import the finalized spreadsheet into your CRM to automatically create these groups. In My People, filter by the "Hasn't Submitted Review" group.
- ☐ Use this list to send personalized review requests through Testimonial Tree, then follow up with a text.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"Client Feedback Makes All the Difference."		
	Reel	Mid-Year Market Update for Communities.		
	Post	Share a video thanking clients who've already left feedback.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

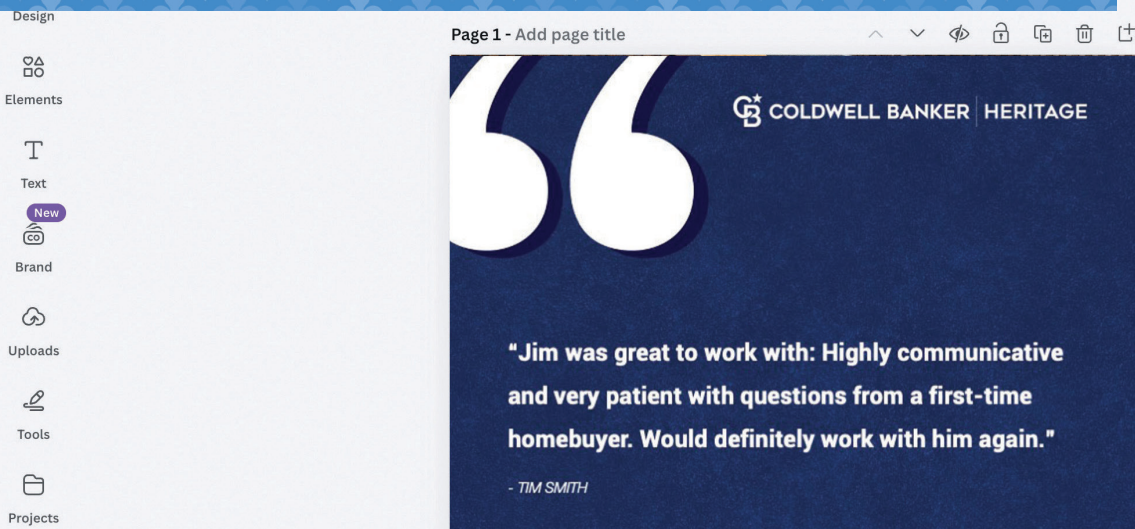
- Send review requests to clients who closed within the past 6–12 months.
- Reach out to those with positive feedback in past emails or texts.
- Contact any clients whose contact information or mailing addresses need to be updated.

AI TASK OF THE WEEK

Ask AI to write a personalized Moxi review request email that includes your Testimonial Tree link or review request URLs.

NOTES FOR THE WEEK

JUNE - REVIEWS & REPUTATION



WEEK 3

GENERATE TESTIMONIAL GRAPHICS

LEARNING GOAL

Turn written reviews into branded, visually appealing graphics you can share year-round.

MASTERY TASKS

- ☐ Collect your top 6–10 testimonials.
- ☐ Use Canva to create branded testimonial templates (horizontal, square, and story format).
- ☐ Save all completed graphics in your “Testimonials” folder within your Content Library.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Story	Celebrate Fathers and Father Figures in your life for Fathers day.		
	Post	"Kind Words from My Clients" – single quote post or carousel of reviews.		
	Post	"Every Home Has a Story – Here's One I'll Never Forget."		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Let clients know you are featuring their kind words on social media.
- Send a thank-you message to each reviewer with a small note or branded card.
- Send Father's Day wishes, to your clients, who are dads.

AI TASK OF THE WEEK

Ask AI to rewrite your testimonials into short, story-style social captions, such as "From searching to sold—[Client Name]'s journey to their dream home."

NOTES FOR THE WEEK

JUNE - REVIEWS & REPUTATION

WEEK 4

SCHEDULE TESTIMONIAL GRAPHICS & ADD TO CONTENT LIBRARY

LEARNING GOAL

Distribute your testimonial graphics strategically across platforms and ensure they're conveniently archived for future reuse.

MASTERY TASKS

- ☐ Turn one or two top testimonials into short video or story animations for added reach.
- ☐ Add all final versions, captions, and scheduling links to your Content Library for ongoing use.
- ☐ Schedule your testimonial posts on Facebook, Instagram, and other channels across multiple weeks using Listing to Leads.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Homeownership Facts for Homeownership Month from NAR Stats.		
	Reel	"Real Feedback. Real Results." — rotating testimonial posts.		
	Post	Post Upcoming 4th of July Fireworks Display times for your communities.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Reach out to clients who may be interested in receiving monthly neighborhood updates and add them to your Neighborhood News list.
- Tag featured clients in posts to increase engagement and organic reach.
- Send a thank-you message to everyone who left a review this month.

AI TASK OF THE WEEK

Ask AI to create a 6-week social schedule alternating testimonial graphics, review request reminders, and client thank-you posts.

NOTES FOR THE WEEK

JUNE CHECKLIST

WEEK 1 – ADD NEW CLIENTS TO CRM & GROUPS

- ☐ Export your sales from your MLS by searching “Sold” under your name as the agent. Download the results as a spreadsheet. If you belong to multiple boards, repeat process to ensure you capture every closed deal.
 - ☐ Combine sales into a spreadsheet and add columns for First Name, Last Name, Email, Phone, and Category.
 - ☐ Categorize contacts (Buyer, Seller, and Past Client), separating multiple categories with commas.
 - ☐ Ask AI to organize your CRM contact notes into clear follow-up categories: Review Needed, Referral Source, and Active Contact.
-

WEEK 2 – REVIEW WHO HAS SUBMITTED REVIEWS & SEND REQUESTS

- ☐ Run a check to see who has already left reviews on Google, Zillow, Realtor.com, Homes.com and Facebook. Identify clients who have not yet left a review and within the Categories column in your contact spreadsheet, add additional groups called “Has Left Review” or “Hasn’t Submitted Review.”
 - ☐ Import the final spreadsheet into your CRM. In My People, filter by the “Hasn’t Submitted Review” group.
 - ☐ Use this list to send personalized review requests through Testimonial Tree, then follow up with a text.
 - ☐ Ask AI to write a Moxi review request email that includes your Testimonial Tree link or review request URLs.
-

WEEK 3 – GENERATE TESTIMONIAL GRAPHICS

- ☐ Collect your top 6–10 testimonials.
 - ☐ Use Canva to create branded testimonial templates (horizontal, square, and story format).
 - ☐ Save all completed graphics in your “Testimonials” folder within your Content Library.
 - ☐ Ask AI to rewrite your testimonials into short, story-style social captions, such as “From searching to sold—[Client Name]’s journey to their dream home.”
-

WEEK 4 – SCHEDULE TESTIMONIAL GRAPHICS & ADD TO CONTENT LIBRARY

- ☐ Turn one or two top testimonials into short video or story animations for added reach.
- ☐ Add all final versions, captions, and scheduling links to your Content Library for ongoing use.
- ☐ Schedule your testimonial posts on Social Media channels across multiple weeks using Listing to Leads.
- ☐ Ask AI to create a 6-week social schedule alternating testimonial graphics, review request reminders, and client thank-you posts.

UTILIZE OUR GRAPHICS

Scan to view this month's social media graphics and share them to your social channels.



AVAILABLE TUTORIALS



IMPORTING CONTACTS INTO YOUR CRM & CREATING GROUPS

How to map spreadsheet columns correctly and create and filter client groups.

SENDING REVIEW REQUESTS WITH TESTIMONIAL TREE

How to send bulk and personalized review requests and connect them to your Realtor profiles.

DESIGNING TESTIMONIAL GRAPHICS IN CANVA OR MARKETING CENTER

How to format quote graphics in square, horizontal, and story sizes, use client first names only for privacy, and save them in your Testimonials folder in the Content Library.

SCHEDULING TESTIMONIAL CONTENT IN LISTING TO LEADS

How to rotate review content across multiple weeks, mix testimonials with listing and community posts, and avoid posting the same review too frequently.

THIS MONTH'S POP-BY IDEAS AND ASSETS



SELLER'S FIRST STEP

Business Card Checklist Magnet:

"If selling is on your radar this year, step one is understanding your market. I'm always happy to prepare a quick report for you."



HOMEOWNERSHIP LOOKS GOOD ON YOU

Mini sunscreen or lip balm with a branded sticker:

"Just a little summer hello — hope you're loving life as a homeowner!"



KIND WORDS GO A LONG WAY

Small notepad or magnet with your review QR code:

"If you've ever felt I earned it, I'd be honored by a quick review — it truly helps my small business."

JULY - STAY IN FRONT OF CLIENTS



WEEK 1

CREATE CLIENT GROUPS

LEARNING GOAL

Organize your database into meaningful follow-up segments and ensure key personal details are captured.

MASTERY TASKS

- ☐ Create additional groups in Moxi - A, B and C:
A = Hot/Ready/Has Referred Previously, B = Warm/Will be ready soon, C = Cold/Unsure-No Communication.
- ☐ Starting with your A list and working through to your C list, audit and update client records with the following details: birthday, home anniversary, partner name, children's names or key notes, last communication, and next steps.
- ☐ Export data for all contacts for archiving purposes.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"Live Well with Coldwell" Campaign.		
	Post	Home Buying and Selling Lead Generation - Considering Selling?		
	Story	Happy 4th of July.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Send clients a list of upcoming community fireworks displays.
- Message clients: "Have you moved this year? I'd love to update your address and stay in touch."

AI TASK OF THE WEEK

Ask AI to review your contact groups and identify any missing categories to ensure your list is comprehensive.

NOTES FOR THE WEEK

JULY - STAY IN FRONT OF CLIENTS



WEEK 2

PICK SUBSCRIPTION OR CAMPAIGN FOR EACH GROUP

LEARNING GOAL

Assign each group a communication plan that fits their needs and timeline.

MASTERY TASKS

- ☐ Create a list of all contact groups.
- ☐ Match campaign types to each group's goals, such as newsletters for past clients and alerts for active buyers or sellers.
- ☐ Document which groups will receive each type of content and how often.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"Want neighborhood updates, seasonal tips, or real estate news? Sign-up to receive my newsletter."		
	Reel	"What type of homeowner are you?" quiz with CTA to join your email list.		
	Story	"My favorite event this weekend: [Insert local fair, concert, or market] – here's why it's a can't-miss!"		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- “I’m rolling out personalized market updates—would you be interested in receiving monthly information about your neighborhood?”
- “Would you like to receive home maintenance tips or seasonal reminders in your inbox?”

AI TASK OF THE WEEK

Ask AI to remind you to Review Your Campaigns & Subscriptions at this same time next year.

NOTES FOR THE WEEK

JULY - STAY IN FRONT OF CLIENTS

SELLER | Spring Selling Season

10-touch Spring Seller Drip Campaign

Coldwell Banker (parent company)

[PREVIEW](#)

[ADD TO CAMPAIGNS](#)

HOMEOWNER | Home Improvement Tips

4-touch Home Improvement Tips Quarterly Drip Campaign

Coldwell Banker (parent company)

[PREVIEW](#)

[ADD TO CAMPAIGNS](#)

DIY | Use With CBHL Assets [Marketing Center]

Brokerage

[PREVIEW](#)

[ADD TO CAMPAIGNS](#)

DIY | Build Your Own Campaign

Build Your Own Campaign

Brokerage

[PREVIEW](#)

[ADD TO CAMPAIGNS](#)

SELLER | FSBO Campaign

Designed to be a simple drip campaign for you to advertise the benefits of...

Brokerage

[PREVIEW](#)

[ADD TO CAMPAIGNS](#)

WEEK 3

SUBSCRIBE GROUPS TO CAMPAIGN OR SUBSCRIPTION

LEARNING GOAL

Ensure every contact is enrolled in the right campaign and receiving consistent, automated communication.

MASTERY TASKS

- ☐ Add yourself to all campaigns that have automated communications.
- ☐ Assign each contact group to the appropriate campaigns or subscriptions.
- ☐ Confirm that all campaign automations are running correctly.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Story	Behind-the-scenes post: What I'm doing today to help you (close sooner/make process stress free/make experience unique).		
	Post	Post Personalized Local Football Schedule.		
	Post	CB Quotables.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

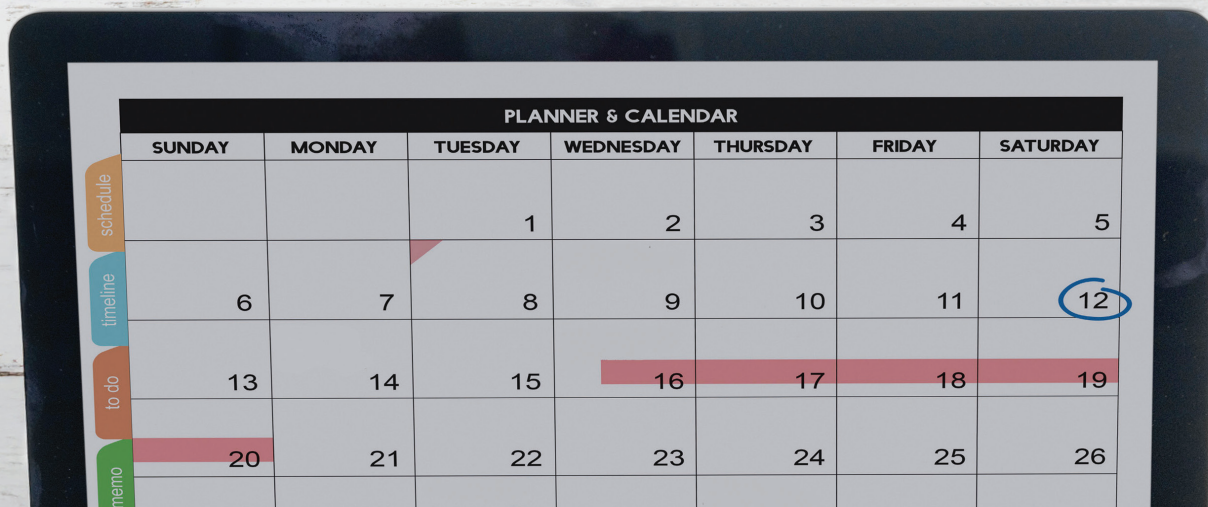
- "I've added you to my monthly update—let me know if there's anything specific you'd like to receive."
- Expect helpful updates soon. As you have been added to my market watch list."

AI TASK OF THE WEEK

Ask AI to create a personalized follow-up using details from your last interaction and any upcoming events, then naturally guide the conversation toward real estate.

NOTES FOR THE WEEK

JULY - STAY IN FRONT OF CLIENTS



WEEK 4

SCHEDULE FOLLOW-UP DATES

LEARNING GOAL

Map out consistent personal follow-up touches for each group beyond automation.

MASTERY TASKS

- ☐ Map out the communication frequency and content type for each contact group.
- ☐ Add Clients to Birthday & Anniversary Campaigns, be sure to include their Birth/Anniversary Date in their profile.
- ☐ Add follow-up reminders for hot and warm leads.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Reel	This or That: Do you prefer a Vacation with sight-Seeing in New Place, OR a Stay-cation.		
	Post	Upcoming Events this Weekend in Your Communities.		
	Story	Local Expert Post: "Did you know [neighborhood] home values changed X% recently? Ask me how your street stacks up."		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- “Just scheduled my check-ins for the quarter—looking forward to catching up!”
- “Thinking of you this month—let me know if there's anything real estate-wise I can help with.”

AI TASK OF THE WEEK

Ask AI to write birthday and anniversary messages in your voice that you can easily copy and paste for scheduling.

NOTES FOR THE WEEK

JULY CHECKLIST

WEEK 1 – CREATE CLIENT GROUPS

- ☐ Create additional groups in Moxi - A, B and C:
A = Hot/Ready/Has Referred Previously, B = Warm/Will be ready soon, C = Cold/Unsure-No Communication.
 - ☐ Working through to your A-C lists, audit and update client records with the following details: birthday, home anniversary, partner name, children's names or key notes, last communication, and next steps.
 - ☐ Export data for all contacts for archiving purposes.
 - ☐ Ask AI to review your contact groups and identify any missing categories to ensure your list is comprehensive.
-

WEEK 2 – PICK SUBSCRIPTION OR CAMPAIGN FOR EACH GROUP

- ☐ Create a list of all contact groups.
 - ☐ Match campaign types to each group's goals, such as newsletters for past clients and alerts for active buyers or sellers.
 - ☐ Document which groups will receive each type of content and how often.
 - ☐ Ask AI to remind you to Review Your Campaigns & Subscriptions at this same time next year.
-

WEEK 3 – SUBSCRIBE GROUPS TO CAMPAIGN OR SUBSCRIPTION

- ☐ Add yourself to all campaigns that have automated communications.
 - ☐ Assign each contact group to the appropriate campaigns or subscriptions.
 - ☐ Confirm that all campaign automations are running correctly.
 - ☐ Ask AI to create a personalized follow-up using details from your last interaction and any upcoming events, then naturally guide the conversation toward real estate.
-

WEEK 4 – SCHEDULE FOLLOW-UP DATES

- ☐ Map out the communication frequency and content type for each contact group.
- ☐ Add Clients to Birthday/Anniversary Campaigns, make sure to include the relevant date in their profile.
- ☐ Add follow-up reminders for hot and warm leads.
- ☐ Ask AI to write birthday and anniversary messages in your voice that you can copy and paste for scheduling.

UTILIZE OUR GRAPHICS

Scan to view this month's social media graphics and share them to your social channels.



AVAILABLE TUTORIALS



CREATING & MANAGING A/B/C GROUPS IN MOXI

How to build hot/warm/cold groups, move contacts between groups as motivation changes, and use group filters for follow-up.

UPDATING CLIENT RECORDS FOR LONG-TERM NURTURE

How to store birthdays/anniversaries/family info, log last communication and next steps consistently, avoid duplicate or outdated records.

SUBSCRIBING GROUPS TO CAMPAIGNS & SUBSCRIPTIONS

How to assign groups to receive content/campaigns, ensure the right content goes to the right people, and test campaign enrollment before sending to clients.

PRE-SCHEDULING FOLLOW-UPS & REMINDERS IN YOUR CRM

How to set recurring reminders for leads, pre-schedule birthday and home-anniversary touches, and balance automation with personal outreach.

THIS MONTH'S POP-BY IDEAS AND ASSETS



SOAK UP THE SUMMER

Branded Cooling Towel:

"A little something to help you beat the July heat.

If a move is on your radar this year, I'd love to help you plan ahead."



HOME IS WHERE THE BBQ IS

Mini grilling seasoning or BBQ spice rub:

"Summer gatherings start at home — hope your backyard is busy this season!"

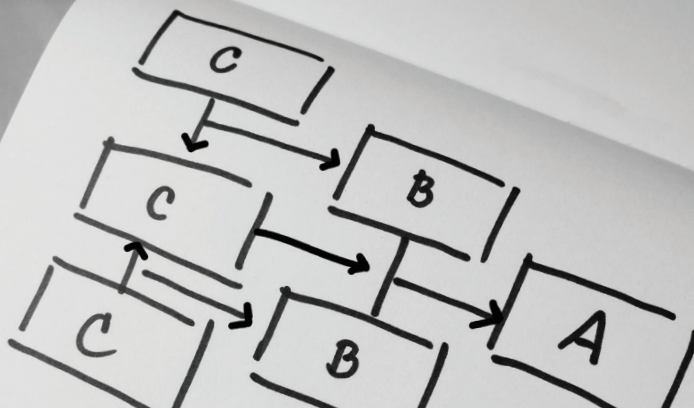


RED, WHITE & YOU

Small 4th of July treat bag with flag-themed snack:

"Wishing you a safe and happy Fourth — thankful for wonderful clients like you!"

AUGUST - CREATE A CONSISTENT CLIENT EXPERIENCE



WEEK 1

PLAN COMMUNICATIONS FOR EACH STAGE IN THE TRANSACTION

LEARNING GOAL

Map out every stage of your client journey so communication feels seamless, proactive, and consistent.

MASTERY TASKS

- ☐ Outline the key stages of your buyer/seller processes (e.g., Pre-Listing, Active, Pending, Closed, and Post-Closing).
- ☐ List what information clients should receive at each stage (what to expect, reminders, etc.), and break these steps down further based on status—such as Contract Accepted, Inspection Complete, and Closing Scheduled.
- ☐ Create a Doc for easy reference 'Client Communication Documentation', in this documentation, outline the full process for buyers and sellers, adding when and what communications occur for each stage.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Is Now the Right Time to Sell?		
	Reel	"My Promise to Clients" — share what clients can expect when they work with you.		
	Post	Client Testimonials.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Check in with past clients to see how any summer moves went.
- Send a message to leads: "Curious what to expect when buying or selling this fall?"

AI TASK OF THE WEEK

Ask AI to review your process documentation by pasting your "Client Communication Documentation" and your list of information needed for each stage into ChatGPT.

NOTES FOR THE WEEK

AUGUST - CREATE A CONSISTENT CLIENT EXPERIENCE

Edit groups

+ Create a new group

– Green category

– Orange category

– Purple category

– Red category

– Yellow category

WEEK 2

PUT PROCESS INTO ACTION

LEARNING GOAL

Organize your CRM and marketing system to match the client journey you just outlined.

MASTERY TASKS

- ☐ Build corresponding groups in your CRM, ensuring the groups match the stages in your communication process. Examples: Buyer – Active, Buyer – Start Tour, Seller – Pre-Listing, Seller – Pending, Post-Close.
- ☐ Define the triggers that move a client from one group to the next, and add these triggers to your documentation.
- ☐ Determine how you will incorporate this into your current workflow so you remember to update them at each stage.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Consumer Campaign featuring the Move Meter.		
	Reel	"Buying or Selling? Here's What Happens First" – short video or carousel explaining your process.		
	Post	"Back to School Wishes" – post a photo of supplies.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Reconnect with summer closings to check on their move-in.
- Ron's 4-Questions to 5 Clients:
 - Are you in your ideal home?
 - Have you thought about selling?
 - What price-point would make you a motivated seller?
 - Do you know anyone thinking about selling?

AI TASK OF THE WEEK

In the same thread that you had AI review your process, Ask AI to create email copy for every stage, including the specific resources clients need at that point in the process.

NOTES FOR THE WEEK

AUGUST - CREATE A CONSISTENT CLIENT EXPERIENCE

[PREVIEW](#)
[ADD TO EMAILS](#)

DIY | Use With CBHL Event Campaign Assets [Marketing Cent

Brokerage

[PREVIEW](#)
[ADD TO EMAILS](#)

DIY | Use With CBHL Email Campaign Assets [Marketing Center]

Brokerage

[PREVIEW](#)
[ADD TO EMAILS](#)

DIY | Build Your Own Email Template

Brokerage

[PREVIEW](#)
[ADD TO EMAILS](#)

CBGL | H&E Magazine Summer 2023

Coldwell Banker (parent company)

[PREVIEW](#)
[ADD TO EMAILS](#)

WEEK 3

CREATE EMAILS & CAMPAIGNS

LEARNING GOAL

Build automated and repeatable communication for every client type and stage.

MASTERY TASKS

- ☐ In Moxi, Add a 'DIY | Build Your Own Campaign' from the Library, rename this Campaign for the Applicable Group/Stage Buyer – Active, Buyer – Start Tour, Seller – Pre-Listing, Seller – Pending, Post-Close.
- ☐ Edit your DIY Email / Create additional DIY Emails in Moxi.
- ☐ Add your emails into each campaign and schedule timing (e.g., Day 1, Day 5, Day 10).

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"Client Communication is Everything" – how you keep clients informed.		
	Reel	"Get Ready for Fall" – End-of-summer maintenance tasks.		
	Post	Summer Closings – "Thank you to all my summer buyers and sellers. If you're planning a fall move, I'm here to help you prepare."		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Reach out to buyers who are parents and may be more motivated to buy this time of year, with school starting.
- Reach out to 5 clients you don't have email addresses for to see if they would be interested in receiving your Neighborhood News.
- Send a mailer to all clients to see which ones are returned.

AI TASK OF THE WEEK

Ask AI to draft a five-email sequence for your seller process, including subject lines and calls to action.

NOTES FOR THE WEEK

AUGUST - CREATE A CONSISTENT CLIENT EXPERIENCE

WEEK 4

CATEGORIZE CLIENTS & UPDATE SETTINGS

LEARNING GOAL

Finalize your CRM setup so clients are properly grouped and automatically receive the right communication at the right time.

MASTERY TASKS

- ☐ Develop additional campaigns for the other stages.
- ☐ Add yourself to the First Group/Step in the Process.
- ☐ Test each stage as if you were moving through the transaction yourself, confirm emails go out as desired.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"Streamlining for Better Service" — how you're organizing your systems to serve clients better.		
	Story	Updating My Database — "I'm updating my database to make sure clients receive local market updates, neighborhood reports, new listings, and upcoming event info.		
	Post	"Consistent Service = Happy Clients" — quote or stat graphic.		
	Post	CB's Birthday on August 27.		

CLIENT OUTREACH TOPICS

- Invite clients to upcoming events at your office or in your community.
- Check-in on Subscribers - is the info I'm sending useful/relevant anymore?
- "Late-Summer Buying Window" — reach out to active or potential buyers to let them know that late August can bring motivated sellers who want to be under contract before school starts or before fall. Offer to send updated listings, schedule tours, or run numbers for their price range.

AI TASK OF THE WEEK

Ask AI to analyze your CRM categories and suggest where you can add automation or triggers to simplify future updates.

NOTES FOR THE WEEK

AUGUST CHECKLIST

WEEK 1 – PLAN COMMUNICATIONS FOR EACH STAGE IN THE TRANSACTION

- ☐ Outline the key stages of your buyer/seller processes (e.g., Pre-Listing, Active, Pending, Closed, and Post-Closing).
 - ☐ List what information clients should receive at each stage (what to expect, reminders, etc.), and break these steps down further based on status—such as Contract Accepted, Inspection Complete, and Closing Scheduled.
 - ☐ Create a Doc for easy reference 'Client Communication Documentation', in this documentation, outline the full process for buyers and sellers, adding when and what communications occur for each stage.
 - ☐ Ask AI to review your process documentation by pasting your "Client Communication Documentation" and your list of information needed for each stage into ChatGPT.
-

WEEK 2 – PUT PROCESS INTO ACTION

- ☐ Build corresponding groups in your CRM, ensuring the groups match the stages in your communication process. Examples: Buyer – Active, Buyer – Start Tour, Seller – Pre-Listing, Seller – Pending, Post-Close.
 - ☐ Define the triggers that move a client from one group to the next, and add these triggers to your documentation.
 - ☐ Determine how you will incorporate this into your workflow so you remember to update them at each stage.
 - ☐ In the same thread that you had AI review your process, Ask AI to create email copy for every stage, including the specific resources clients need at that point in the process.
-

WEEK 3 – CREATE EMAILS & CAMPAIGNS

- ☐ In Moxi, Add a 'DIY | Build Your Own Campaign' from the Library, rename this Campaign for the Applicable Group/Stage Buyer – Active, Buyer – Start Tour, Seller – Pre-Listing, Seller – Pending, Post-Close.
 - ☐ Edit your DIY Email / Create additional DIY Emails in Moxi.
 - ☐ Add your emails into each campaign and schedule timing (e.g., Day 1, Day 5, Day 10).
 - ☐ Ask AI to draft a five-email sequence for your seller process, including subject lines and calls to action.
-

WEEK 4 – CATEGORIZE CLIENTS & UPDATE SETTINGS

- ☐ Develop additional campaigns for the other stages.
- ☐ Add yourself to the First Group/Step in the Process.
- ☐ Test each stage as if you were moving through the transaction yourself, confirm emails go out as desired.
- ☐ Ask AI to analyze your CRM categories and suggest where you can add automation or triggers for future updates.

UTILIZE OUR GRAPHICS

Scan to view this month's social media graphics and share them to your social channels.



AVAILABLE TUTORIALS



BUILDING CLIENT JOURNEY STAGES INSIDE YOUR CRM

How to define Buyer & Seller stages clearly, map stages to CRM groups (Active, Pending, Post-Close, etc.), and keep stages updated automatically.

CREATING & MANAGING AUTOMATED CAMPAIGNS IN MOXI

How to add DIY "Build Your Own" campaigns, edit and personalize campaign emails, and time emails by transaction stage (Day 1, Day 5, Day 10).

USING TRIGGERS TO MOVE CLIENTS THROUGH STAGES

How to document triggers inside your workflow and prevent clients from missing key updates.

TESTING CAMPAIGNS & AUTOMATION BEFORE GOING LIVE

How to test emails as if you are the client, confirm delivery/formatting/timing, and troubleshoot common automation issues.

THIS MONTH'S POP-BY IDEAS AND ASSETS



BACK-TO-SCHOOL, BACK-TO-HOME

Mini school supply kit (pencils, sticky notes, and hand sanitizer):

"Wishing your family a smooth start to the school year — and just a reminder, I'm always here for your home questions."



END-OF-SUMMER HOME CHECK

Mini HVAC filter reminder card or magnet:

"Late summer is the perfect time to prep your home for fall — to keep you on track for the next season, here is my quick seasonal checklist."



LATE-SUMMER SWEET TREAT

Ice cream coupon, Popsicle, or local dessert gift card:

"Just a little end-of-summer hello — hope you're enjoying the season at home!"

SEPTEMBER - BRANDING



WEEK 1

DEFINE YOUR DIFFERENTIATION

LEARNING GOAL

Clarify what sets you apart so your marketing consistently reflects your strengths and the value clients experience when working with you.

MASTERY TASKS

- ☐ Identify the areas where you are #1 (market expertise, communication, negotiation, or community involvement). Review testimonials and client feedback to identify any additional strengths or areas of expertise that clients consistently mention.
- ☐ Identify what makes your client experience unique.
- ☐ Summarize your differentiation points into a detailed bulleted list.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"Why Clients Choose Me" — client quotes.		
	Post	Is Now the Right Time to Sell?		
	Post	Your Buyer Value - Negotiation Skills.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Ask clients for feedback - reach out to trusted clients or peers for feedback on what stood out the most during their experience.
- Reconnect with past clients to check-in and see how they are doing.
- Email your database for feedback: "What do you value most when choosing a Realtor?"

AI TASK OF THE WEEK

Ask AI to summarize your differentiation points into a bulleted list.

NOTES FOR THE WEEK

SEPTEMBER - BRANDING



WEEK 2

DEFINE YOUR AUDIENCE

LEARNING GOAL

Identify who you serve best so your marketing connects directly with your ideal clients.

MASTERY TASKS

- ☐ Review your past year's closings and note patterns — age range, location, lifestyle, or price point.
- ☐ Identify who enjoys working with you most — first-time buyers, families, investors, etc.
- ☐ Summarize "Who You Serve" and select one target group per quarter to focus on in your marketing.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"I Love Working with" (First-Time Home Buyers, Investors, etc) — post describing Who You Serve.		
	Story	Patriot Day.		
	Post	"Live Well with Coldwell" Campaign.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Reach out to your most common client type (buyers, relocations, etc.) with a personalized tip.
- Contact clients you worked with last year for referrals in their circle.
- Send a thank-you message to your core audience segment for supporting your business.

AI TASK OF THE WEEK

Ask AI to generate a quarter's worth of value-focused social media posts tailored to your target audience.

NOTES FOR THE WEEK

SEPTEMBER - BRANDING



WEEK 3

CREATE YOUR SLOGAN & CORE MESSAGING

LEARNING GOAL

Develop a consistent voice and key messages to use across all your marketing materials.

MASTERY TASKS

- ☐ Use AI to create a personalized slogan.
- ☐ Use AI to write 3–5 core messaging points to emphasize in all your marketing (e.g., community, trust, guidance, results).
- ☐ Write a short tagline or “brand promise” statement for use on your website, bio, and graphics.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Reel	“My Mission in Real Estate.”		
	Post	“3 Words That Represent My Brand.”		
	Story	First Day of Fall.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- For clients who bought in past years, a “home anniversary” message in September feels personal.
- Ask your trusted clients to share their feedback on your new branding & tagline.
- Like or heart ten client accomplishments or positive updates on Facebook or Instagram, and leave a short, helpful comment or encouraging note on each.

AI TASK OF THE WEEK

Ask AI to refine your slogan using your bulleted “Differential Point” list so it reflects what sets you apart. Then have AI create five supporting points that reinforce that positioning.

NOTES FOR THE WEEK

SEPTEMBER - BRANDING



WEEK 4

DESIGN YOUR VISUAL IDENTITY

LEARNING GOAL

Create a consistent visual identity using CB templates and organize your marketing materials for repeatable use.

MASTERY TASKS

- ☐ Select one CB-approved template for each key category (Just Listed, Just Sold, Open House, Market Update, Testimonials, Lead Gen) and add your headshot and contact info to each.
- ☐ Choose imagery that reflects your market and audience—homes, lifestyle, and community visuals—being mindful and inclusive in your selections.
- ☐ Save all finalized templates to your Content Library and create a simple one-page reference listing your slogan, chosen templates, imagery style, and standard CTAs.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Share Open House round up from local CB FB pages.		
	Post	Post a Q3 Market Update & Forecast for Local Communities.		
	Post	"Local Fall Favorites" Highlight a local fall festival or treat.		
	Post	Client Testimonials.		

CLIENT OUTREACH TOPICS

- Share your new look in a client newsletter.
- Send a fall-themed “brand reveal” postcard to your database.
- Offer to feature client homes in your newly branded marketing templates.

AI TASK OF THE WEEK

Ask AI to analyze the type of homes you typically list or help buyers purchase and generate a recommended photo style guide (lighting, color tones, and types of shots) so your visuals feel cohesive across all future listings and marketing materials.

NOTES FOR THE WEEK

SEPTEMBER CHECKLIST

WEEK 1 – DEFINE YOUR DIFFERENTIATION

- ☐ Identify the areas where you are #1 (market expertise, communication, negotiation, or community involvement). Review testimonials to identify any additional strengths or areas of expertise that clients consistently mention.
 - ☐ Identify what makes your client experience unique.
 - ☐ Summarize your differentiation points into a detailed bulleted list.
 - ☐ Ask AI to summarize your differentiation points into a bulleted list.
-

WEEK 2 – DEFINE YOUR AUDIENCE

- ☐ Review your past year's closings and note patterns — age range, location, lifestyle, or price point.
 - ☐ Identify who enjoys working with you most — first-time buyers, families, investors, etc.
 - ☐ Summarize “Who You Serve” and select one target group per quarter to focus on in your marketing.
 - ☐ Ask AI to generate a quarter’s worth of value-focused social media posts tailored to your target audience.
-

WEEK 3 – CREATE YOUR SLOGAN & CORE MESSAGING

- ☐ Use AI to create a personalized slogan.
 - ☐ Use AI to write 3–5 core messaging points to use in all your marketing (e.g., community, trust, guidance, results).
 - ☐ Write a short tagline or “brand promise” statement for use on your website, bio, and graphics.
 - ☐ Ask AI to refine your slogan using your bulleted “Differential Point” list so it reflects what sets you apart. Then have AI create five supporting points that reinforce that positioning.
-

WEEK 4 – DESIGN YOUR VISUAL IDENTITY

- ☐ Select one CB–approved template for each key category (Just Listed, Just Sold, Open House, Market Update, Testimonials, Lead Gen) and add your headshot and contact info to each.
- ☐ Choose imagery that reflects your market and audience—homes, lifestyle, and community visuals.
- ☐ Save all finalized templates to your Content Library and create a simple one-page reference listing your slogan, chosen templates, imagery style, and standard CTAs.
- ☐ Analyze the type of homes you typically list or help buyers purchase and generate a photo style guide (lighting, color tones, and types of shots) so your visuals feel cohesive across marketing materials.

UTILIZE OUR GRAPHICS

Scan to view this month's social media graphics and share them to your social channels.



AVAILABLE TUTORIALS



USING AI TO DEFINE YOUR DIFFERENTIATION

How to input testimonials and feedback into AI and turn into marketing-ready bullet points.

IDENTIFYING & SEGMENTING YOUR TARGET AUDIENCE

How to review past closings, tag audience types, and align with quarterly marketing goals.

CREATING A SLOGAN & CORE BRAND MESSAGING WITH AI

How to generate slogan options, create core messaging pillars, and write a short brand promise for bios, graphics, and email.

PERSONALIZING COLDWELL BANKER TEMPLATES FOR YOUR BRAND

How to select approved CB templates, add your headshot, contact info, and slogan, and save branded versions into your Content Library.

CREATING A SIMPLE BRAND REFERENCE SHEET

How to document your slogan, imagery style, CTAs, and template set, and keep branding consistent across social, print, and email.

THIS MONTH'S POP-BY IDEAS AND ASSETS



PUMPKIN SPICE & MARKET ADVICE

Fall Scented Sachet:

"Thinking about spicing things up with a new address? Let's talk."



FALL RENTER CHECK-IN

Foam Puzzle House Bank:

*"Every goal starts somewhere. Big plans begin with small steps.
If owning a home feels far off, let's talk about what it really takes."*

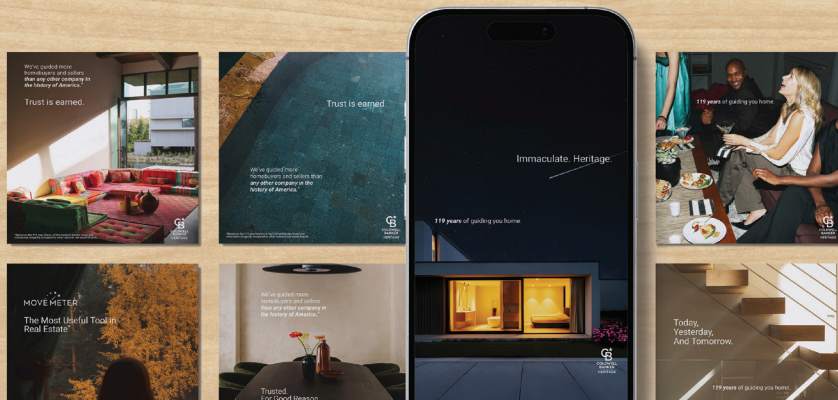


AUTUMN TREATS

Bag with your Card and Apple Cider Packets:

*"Nothing says fall like warm apple cider. Enjoy a cozy cup on me
— and if a new home is part of your fall plans, I'd love to help."*

OCTOBER - USING EXTERNAL DATA TO CREATE VALUABLE CONTENT



WEEK 1

PERSONALIZE & DOWNLOAD CB CAMPAIGN QUOTABLES

LEARNING GOAL

Customize and download the current Coldwell Banker campaign materials so your marketing reflects your brand and message.

MASTERY TASKS

- ☐ Log into CB tools and personalize each piece with your photo, name and brand stock photography. Save all final versions in your Content Library under a dedicated "CB Campaign" folder.
- ☐ Use AI to personalize copy for your campaign with your messaging.
- ☐ In L2L, schedule your social media post/ads with your personalized messaging.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Home Buying and Selling Lead Generation - "Your Dream Home is Waiting."		
	Post	"Proud to Be Part of CB" — use one corporate-branded graphic or stat.		
	Post	National Coffee Day — feature your local coffee shop.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Reach out to clients with big yards or older homes and offer a fall curb-appeal audit before the holidays approach.
- Send your five most loyal clients a \$10 gift card for Starbucks for National Coffee Day - Thought you might enjoy a coffee on me today. I appreciate you being part of my business.

AI TASK OF THE WEEK

Ask AI to create short, on-brand captions that pair with your CB campaign pieces and align with your brand messaging.

NOTES FOR THE WEEK

OCTOBER - USING EXTERNAL DATA TO CREATE VALUABLE CONTENT

WEEK 2

MAKE NAR ASSETS YOUR OWN

LEARNING GOAL

Gather all newly released NAR marketing materials and prepare them for use in your content strategy.

MASTERY TASKS

- ☐ Find a Recent Interesting Report from NAR, Download Data.
- ☐ Upload Data to AI to Create an Infographic from an NAR report and write personalized copy for your posts.
- ☐ In L2L, schedule your social media post/ads with your personalized messaging.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"Homeownership Insights" – share one NAR statistic or graphic.		
	Post	Right Time to Sell CB Graphics.		
	Reel	Is Fall the Right Time to Sell?		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

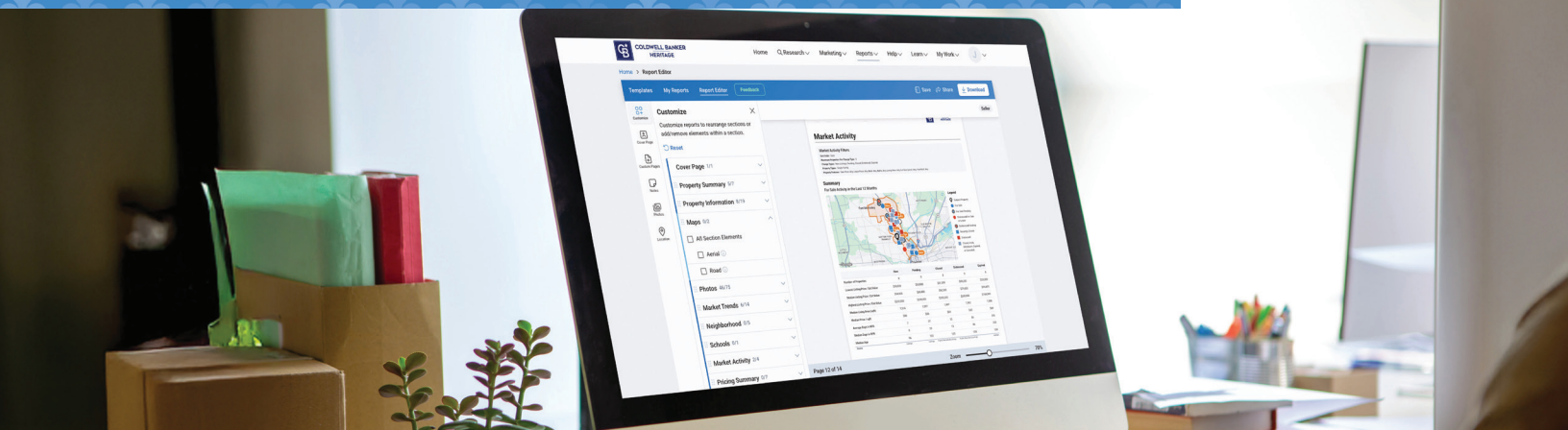
- Send a helpful NAR stat to buyers or sellers
 - “Saw this updated NAR insight and thought of you.”
- Ask clients if they want a list of local Halloween events, such as trunk-or-treat schedules or community festivals. Share our annual Beggar’s Night times blog.
- Send review requests to clients from this year who haven't yet left a review.

AI TASK OF THE WEEK

Grab a report from NAR and upload the PDF into Canva AI. Then select the + option in the bottom left and apply your CB Brand Kit. Then ask Canva AI to create an infographic summarizing the key data. Choose your preferred infographic and add your personal branding elements—your headshot, contact info, and any approved CB template styling.

NOTES FOR THE WEEK

OCTOBER - USING EXTERNAL DATA TO CREATE VALUABLE CONTENT



WEEK 3

TAKE RPR® TO THE NEXT LEVEL

LEARNING GOAL

Use RPR® reports to create localized content that strengthens your expertise and stays aligned with your brand.

MASTERY TASKS

- ☐ Generate RPR® Market Activity or Neighborhood Reports for your key service areas and upload them into a single thread with AI.
- ☐ Ask AI to write captions and messaging that translate your RPR® data into consumer-friendly language in your brand voice, and generate multiple variations — educational, curiosity-based, and clear CTA posts.
- ☐ In L2L, schedule your social media post/ads with your personalized messaging.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Client Testimonials.		
	Post	"What Buyers Should Know Right Now" — use an AI-written caption paired with a CB template.		
	Post	Fire Safety Month — reminders for smoke detectors and CO alarms.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

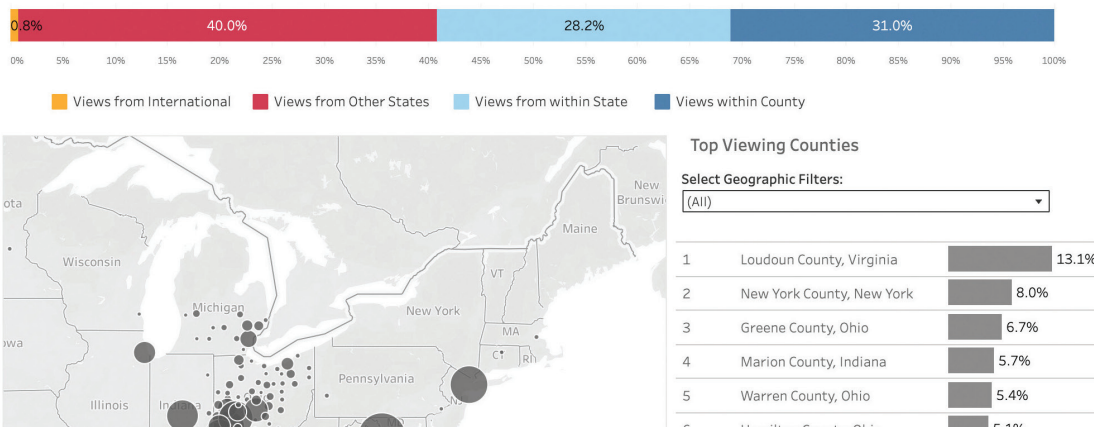
- Share one meaningful RPR® insight with active clients: “Just pulled updated local stats — here's what stands out this month.”
- Touch base with past buyers offering help reviewing their insurance, tax assessment, or current home value.
- “Fire Safety Check-In” — reach out to clients with a reminder to test smoke detectors as we head into fall. Offer to drop off fresh batteries or a new smoke detector if they need one.

AI TASK OF THE WEEK

Ask AI to create a 4-week social plan using the RPR® insights you uploaded, including weekly posts, one email, and a short market update script.

NOTES FOR THE WEEK

OCTOBER - USING EXTERNAL DATA TO CREATE VALUABLE CONTENT



WEEK 4

CONNECT CROSS-MARKET DATA WITH MOVE METER ASSETS

LEARNING GOAL

Use the Realtor.com Cross-Market Demand Report to understand where potential buyers are coming from — then plug that insight into Move Meter assets to create highly relevant relocation content.

MASTERY TASKS

- ☐ Pull the most recent Realtor.com Cross-Market Demand Report and identify the top 3 inbound markets showing interest in your city or region.
- ☐ Run Move Meter® comparisons (Your City vs. Inbound Market) for each of these top areas. Use AI to personalize your captions.
- ☐ In L2L, schedule your social media post/ads with your personalized messaging.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	The Top Counties Moving to X County.		
	Post	Create poll to vote on clients Pumpkin Carvings or Kids Costumes.		
	Reel	Top 3 Things I Tell Every Seller in the Fall Market.		
	Post	Client Testimonials.		

CLIENT OUTREACH TOPICS

- Send a scheduled CB or NAR graphic in a direct message to someone preparing to make a move this fall.
- Best Pumpkin/Costume Contest: Invite clients to send in pumpkin carving photos or kids' costumes — winner gets a local bakery or coffee shop gift card.
- Engage with your clients Halloween posts on social media.

AI TASK OF THE WEEK

Ask AI to provide additional insights about the market areas you're comparing, and note any standout data points you can use in your social media post copy.

NOTES FOR THE WEEK

OCTOBER CHECKLIST

WEEK 1 – PERSONALIZE & DOWNLOAD CB CAMPAIGN QUOTABLES

- ☐ Log into CB tools and personalize each piece with your photo, name and brand stock photography. Save all final versions in your Content Library under a dedicated “CB Campaign” folder.
 - ☐ Use AI to personalize copy for your campaign with your messaging.
 - ☐ In L2L, schedule your social media post/ads with your personalized messaging.
 - ☐ Ask AI to create short captions that pair with your CB campaign pieces and align with your brand messaging.
-

WEEK 2 – MAKE NAR ASSETS YOUR OWN

- ☐ Find a Recent Interesting Report from NAR, Download Data.
 - ☐ Upload Data to AI to Create an Infographic from an NAR report and write personalized copy for your posts.
 - ☐ In L2L, schedule your social media post/ads with your personalized messaging.
 - ☐ Download a NAR report and upload the PDF to Canva. Apply your CB Brand Kit, then use Canva AI to generate an infographic of the key data. Select one and add your headshot, contact info, and CB template styling.
-

WEEK 3 – TAKE RPR® TO THE NEXT LEVEL

- ☐ Generate RPR® Market Activity or Neighborhood Reports for your areas and upload them into a thread with AI.
 - ☐ Ask AI to write captions and messaging that translate your RPR® data into consumer-friendly language in your brand voice, and generate multiple variations – educational, curiosity-based, and clear CTA posts.
 - ☐ In L2L, schedule your social media post/ads with your personalized messaging.
 - ☐ Ask AI to create a 4-week social plan using the RPR® insights you uploaded, including weekly posts, one email, and a short market update script.
-

WEEK 4 – CONNECT CROSS-MARKET DATA WITH YOUR MOVE METER ASSETS

- ☐ Pull the most recent Realtor.com Cross-Market Demand Report and identify the top 3 inbound markets showing interest in your city or region.
- ☐ Run Move Meter® comparisons (Your City vs. Inbound Market) for each of these areas. Use AI to create captions.
- ☐ In L2L, schedule your social media post/ads with your personalized messaging.
- ☐ Ask AI to provide additional insights about the market areas you’re comparing, and note any standout data points you can use in your social media post copy.

UTILIZE OUR GRAPHICS

Scan to view this month's social media graphics and share them to your social channels.



AVAILABLE TUTORIALS



USING RPR® TO GENERATE LOCAL MARKET & NEIGHBORHOOD REPORTS

How to pull market activity, export charts, and use RPR data to support buyer education.

TURNING MARKET DATA INTO CONSUMER-FRIENDLY SOCIAL CONTENT WITH AI

How to upload reports into AI, translate stats into captions, and create posts to support them.

REALTOR.COM CROSS-MARKET DEMAND & MOVE METER® COMPARISONS

How to interpret inbound/outbound market data, use Move Meter®, position relocation insights for buyers and sellers.

MOVE METER® COMPARISON GRAPHICS

Generate Move Meter® graphics from your identified areas from the cross-market report.

THIS MONTH'S POP-BY IDEAS AND ASSETS



LOOKING OUT FOR YOU THIS SEASON

Halloween Reflective Wristlet with business card attached:

"As the nights get darker, I wanted you to have something that helps keep you seen and safe. I'm always looking out for your best interests – whether it's around the neighborhood or in real estate."



FROSTY BOO BOOK TREAT

Wendy's Frosty Boo Books coupon with business card attached:

"A small fall treat for neighbors! If you ever have questions about our local market or your home's value, I'm happy to help."



COZY FALL COCOA KIT

Small bag with hot cocoa packet(s) and festive ghost marshmallows:

"Fall market is heating up while the weather cools down. Enjoy a cup on me – and let me know if you'd like a quick market update."

NOVEMBER - YOUR MARKETING MIX



WEEK 1

RESEARCH YOUR AUDIENCE'S CONTENT HABITS

LEARNING GOAL

Understand where your ideal clients spend their time online so your marketing reaches them where they are.

MASTERY TASKS

- ☐ Identify where your target audience gets their content (Facebook, Instagram, TikTok, YouTube, Google, email, mailers, podcasts, or local events).
- ☐ Review competitor and top local agents to see which platforms they use effectively.
- ☐ Analyze story or Facebook poll results to spot additional channels worth testing.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"Where Do You Get Your Real Estate Info?" — post a poll on Stories or Facebook.		
	Story	Native American Heritage Month - "Did You Know?" — post one fact about the history or contributions of Indigenous communities in your region.		
	Post	"Want to Know What Homes Are Selling For Near You?" — promote your Neighborhood News sign-up link.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Offer a seasonal yard maintenance tips guide about how to responsibly care for a home in fall.
- Sign-up for CB Greeting Card Program to send clients a greeting card.
- Start updating/preparing your client mailing list.

AI TASK OF THE WEEK

Ask AI to analyze your audience descriptions and suggest the strongest platforms for each target client type.

NOTES FOR THE WEEK

NOVEMBER - YOUR MARKETING MIX



WEEK 2

DETERMINE YOUR BUDGET FOR THE YEAR

LEARNING GOAL

Review last year's spending and results so you can build a realistic, ROI-focused marketing budget for next year.

MASTERY TASKS

- ☐ Review what you spent last year (ads, mailers, lead gen tools, events, signs, software, etc.). Identify what worked well and what underperformed.
- ☐ List all leads generated and assign a source to each (referral, social, Google, CB, mailers, open house).
- ☐ Decide whether your budget needs to grow, stay the same, or be reallocated.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"Thank You, Veterans" — respectful acknowledgment post.		
	Reel	"VA Loan Benefits Explained" — carousel with 3–4 simple points.		
	Reel	"3 Ways to Prep Your Home for Holiday Hosting."		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Thank clients for being part of your business growth this year and ask if they have feedback on what content they liked most.
- Reach out to client(s) who are veterans and share available homeowner resources, VA program updates, or benefits they may qualify for. Send details about the rewards or savings programs CB offers specifically for veterans.
- Offer trusted local vendor recommendations if needed for home projects or maintenance going into winter.

AI TASK OF THE WEEK

Ask AI to help categorize last year's expenses into buckets and suggest an improved budget structure for next year.

NOTES FOR THE WEEK

NOVEMBER - YOUR MARKETING MIX



WEEK 3

SELECT YOUR MARKETING CHANNELS FOR NEXT YEAR

LEARNING GOAL

Decide which marketing channels to use based on your budget, your audience, and your goals.

MASTERY TASKS

- ☐ Select your priority channels (e.g., Facebook ads, Instagram reels, Google Business posts, mailers, YouTube, open houses, farming, referrals).
- ☐ Decide which channels you'll start, stop, or expand.
- ☐ Determine your goals for each channel.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Reel	"Where I'll Be Showing Up More Next Year."		
	Post	"Planning Season" – behind-the-scenes photo of next year's marketing planning.		
	Post	Buyer Value - Peace of Mind.		
	Post	"So Many things to Be Thankful For" Post - Include Client Closing Photos.		

CLIENT OUTREACH TOPICS

- Send a warm check-in: "Headed into the holiday season—just wanted to say I'm grateful for you. Let me know if you need anything home-related."
- Reach out to buyers who paused their search: "If you're thinking about restarting after the holidays, I can prep options now."

AI TASK OF THE WEEK

Ask AI to recommend a channel mix aligned with your target audience and goals (brand awareness, lead generation, and nurturing).

NOTES FOR THE WEEK

NOVEMBER - YOUR MARKETING MIX



WEEK 4

BUILD YOUR PLAN & SCHEDULE NEXT YEAR'S STEPS

LEARNING GOAL

Create a simple, actionable marketing plan for next year with timelines and tasks you can realistically follow.

MASTERY TASKS

- ☐ Outline your marketing plan for next year — channels, frequency, budget, and goals.
- ☐ Schedule next year's major steps: quarterly campaigns, monthly themes, and weekly tasks.
- ☐ Add all key dates into your calendar or project system (newsletter deadlines, ad refreshes, farming drops, seasonal campaigns).
- ☐ Create a Q1 checklist so you're ready to start right away in January.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"Top Places Buyers Look for Homes Today" – graphic or list.		
	Post	Listing/Open House.		
	Post	Home Buying and Selling Lead Generation - Ready to Start Your Home Search?		
	Post	Client Testimonials.		

CLIENT OUTREACH TOPICS

- Send a year-end message offering a personalized homeownership or investment plan.
- “Hope you had a great Thanksgiving—how’s the home holding up for gatherings this year?”

AI TASK OF THE WEEK

Ask AI to convert your marketing plan into a quarterly schedule with reminder prompts.

NOTES FOR THE WEEK

NOVEMBER CHECKLIST

WEEK 1 – RESEARCH YOUR AUDIENCE'S CONTENT HABITS

- ☐ Identify where your target audience gets their content (Facebook, Instagram, TikTok, YouTube, Google, email, mailers, podcasts, or local events).
 - ☐ Review competitor and top local agents to see which platforms they use effectively.
 - ☐ Analyze story or Facebook poll results to spot additional channels worth testing.
 - ☐ Ask AI to analyze your audience descriptions and suggest the strongest platforms for each target client type.
-

WEEK 2 – DETERMINE YOUR BUDGET FOR THE YEAR

- ☐ Review what you spent last year (ads, mailers, lead gen tools, events, signs, software, etc.). Identify what worked well and what underperformed.
 - ☐ List all leads generated and assign a source to each (referral, social, Google, CB, mailers, open house).
 - ☐ Decide whether your budget needs to grow, stay the same, or be reallocated.
 - ☐ Ask AI to help categorize last year's expenses and suggest an improved budget structure for next year.
-

WEEK 3 – SELECT YOUR MARKETING CHANNELS FOR NEXT YEAR

- ☐ Select your priority channels (e.g., Facebook ads, Instagram reels, Google Business posts, mailers, YouTube, open houses, farming, referrals).
 - ☐ Decide which channels you'll start, stop, or expand then determine your goals for each channel.
 - ☐ Ask AI to recommend a channel mix aligned with your target audience and goals (brand awareness, lead generation, and nurturing).
-

WEEK 4 – BUILD YOUR PLAN & SCHEDULE NEXT YEAR'S STEPS

- ☐ Outline your marketing plan for next year – channels, frequency, budget, and goals.
- ☐ Schedule next year's major steps: quarterly campaigns, monthly themes, weekly tasks.
- ☐ Add all key dates into your calendar or project system (newsletter deadlines, ad refreshes, farming drops, seasonal campaigns).
- ☐ Create a Q1 checklist so you're ready to start right away in January.
- ☐ Ask AI to convert your marketing plan into a quarterly schedule with reminder prompts.

UTILIZE OUR GRAPHICS

Scan to view this month's social media graphics and share them to your social channels.



AVAILABLE TUTORIALS



UNDERSTANDING YOUR MARKETING ROI

How to track lead sources and results, identify which activities actually generate closings, and measure return on ads, mailers, events, and campaigns.

BUDGETING FOR REAL ESTATE MARKETING

How to break your budget into monthly and quarterly spends, plan for seasonality and peak buying/selling cycles, and forecast growth vs. maintenance spending.

THIS MONTH'S POP-BY IDEAS AND ASSETS



THANKFUL FOR YOU

Sign-up for CB Greeting Card.



WINTER-READY

Branded ice scraper or mini winter car kit:

"Just a little winter prep for the road ahead – drive safe this season!"



SHARE THE PIE

Host a pie giveaway for your Sphere of Influence before Thanksgiving:

"Grateful for amazing clients and friends – enjoy or share a pie and spread a little gratitude this season."

DECEMBER - MARKETING PLANNING



WEEK 1

BUDGET, CHANNELS, MESSAGING, AND TARGET AUDIENCE BY QUARTER

LEARNING GOAL

Set a clear plan for where you'll spend, what messages you'll push, and who you'll target each quarter so your future marketing is consistent and intentional.

MASTERY TASKS

- ☐ Outline your marketing budget for the year (ads, print, events, lead gen, and mailers).
- ☐ Identify your primary marketing mediums (social, email, video, print, direct mail, and events).
- ☐ Define quarterly target audiences and key messaging themes.
- ☐ Partner with agents in the same areas for bulk orders or joint marketing.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	"Planning for the New Year" — share a behind-the-scenes photo of your planning session.		
	Reel	Local Holiday Events.		
	Post	December Market Snapshot.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Reach out to past clients for year-end check-ins and future goals.
–“Thinking about buying or selling next year? I can help you plan.”
- Offer an early “Neighborhood Report” or “Home Value Update.”
- Wish your clients Happy Holidays.

AI TASK OF THE WEEK

Ask AI to develop clear quarterly messaging themes that align with your target audiences, budget priorities, and primary marketing channels.

NOTES FOR THE WEEK

Soc... +9 Heritage Live well with Col...
Social - GL Selle... • Edited 1 ... • CB Heritage (142...



LEARNING GOAL

MASTERY TASKS

- ## SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Is it the Right Time to Sell?		
	Post	Client Testimonials.		
	Post	"Thinking About Selling This Year?" — CTA to schedule a January consult.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Send an end-of-year letter summarizing the past year and forecasting the next.
- Offer a year-end portfolio review for investors.
- Share a December market update with a January outlook.

AI TASK OF THE WEEK

Ask AI to create a 12-month social posting plan that includes themes, captions, and recommended graphics.

NOTES FOR THE WEEK

DECEMBER - MARKETING PLANNING



WEEK 3

USE AI TO GENERATE Q1/Q2 CONTENT & PLAN AHEAD FOR Q3/Q4

LEARNING GOAL

Get ahead by creating and prepping the first half of the year's content now.

MASTERY TASKS

- ☐ Ask AI to generate captions, newsletter content, and blog topics for January–June.
- ☐ Refine the content to match your brand voice and quarterly audiences.
- ☐ Schedule a dedicated content day on your calendar for Q3 and Q4 creation.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Happy Holidays from Me/My Family to You - Photo of You/Family.		
	Post	"What Happened in Real Estate This Year?" — quick year-in-review stat or insight.		
	Post	"Winter Buyer Advantage" — simple graphic: fewer buyers, motivated sellers, faster timelines.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Send a “What to Expect in the Market This Year” email to your list.
- Reach out to potential buyers regarding available opportunities in your office.
- Share seasonal homeowner tips for winter.

AI TASK OF THE WEEK

Ask AI to generate 25–30 caption variations for your Q1 and Q2 topics to give you flexible rotation options.

NOTES FOR THE WEEK

DECEMBER - MARKETING PLANNING

January

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	1 New Year's Day	2	3	4	5	6
7	8	9	10	11	12	13

WEEK 4

SCHEDULE Q1/Q2 CONTENT & SET SCHEDULING DAY FOR Q3/Q4

LEARNING GOAL

Finalize and schedule your first two quarters of content so January starts automated and organized.

MASTERY TASKS

- ☐ Upload and schedule all content for January–June in your posting tool.
- ☐ Double-check folders, captions, and graphics to ensure everything is labeled properly.
- ☐ Add a scheduled “Content Scheduling Day” to your July and October calendar for Q3/Q4.
- ☐ Build a checklist for Q1 so you’re ready to start right away in January.

SOCIAL CONTENT IDEAS

Est. Date	Post Type	Content Ideas	Graphic Complete	Content Scheduled
	Post	Client Appreciation Post.		
	Post	“Continuing My Education to Serve You Better” – post highlighting a designation you hold (or are pursuing) and what it means for buyers and sellers.		
	Reel	Photo Reel looking back on the previous year.		
	Post	Listing/Open House.		

CLIENT OUTREACH TOPICS

- Send a New Year message with a link to a market update or your newsletter.
- Check in with clients planning early-year moves.
- Offer a January "Home Value Check."

AI TASK OF THE WEEK

Ask AI to build a step-by-step checklist to guide your quarterly content scheduling days.

NOTES FOR THE WEEK

DECEMBER CHECKLIST

WEEK 1 – BUDGET, CHANNELS, MESSAGING, AND TARGET AUDIENCE BY QUARTER

- ☐ Outline your marketing budget for the year (ads, print, events, lead gen, and mailers).
 - ☐ Identify your primary marketing mediums (social, email, video, print, direct mail, and events).
 - ☐ Define quarterly target audiences and key messaging themes.
 - ☐ Partner with agents in the same areas for bulk orders or joint marketing.
 - ☐ Ask AI to develop clear quarterly messaging themes that align with your target audiences, budget priorities, and primary marketing channels.
-

WEEK 2 – BUILD CONTENT LIBRARY & USE AI TO CREATE SOCIAL MEDIA PLAN

- ☐ Build or update your Content Library with folders for: Lead Gen, Market Updates, Testimonials, Holidays, Community, and Brand.
 - ☐ Upload graphics, templates, captions, and past posts you want to reuse.
 - ☐ Use AI to create a monthly/weekly social media plan based on your quarterly audience targets.
 - ☐ Ask AI to create a 12-month social posting plan that includes themes, captions, and recommended graphics.
-

WEEK 3 – USE AI TO GENERATE Q1/Q2 CONTENT & PLAN AHEAD FOR Q3/Q4

- ☐ Ask AI to generate captions, newsletter content, and blog topics for January–June.
 - ☐ Refine the content to match your brand voice and quarterly audiences.
 - ☐ Schedule a dedicated content day on your calendar for Q3 and Q4 creation.
 - ☐ Ask AI to generate 25–30 caption for your Q1 and Q2 topics to give you flexible rotation options.
-

WEEK 4 – SCHEDULE Q1/Q2 CONTENT & SET SCHEDULING DAY FOR Q3/Q4

- ☐ Upload and schedule all content for January–June in your posting tool.
- ☐ Double-check folders, captions, and graphics to ensure everything is labeled properly.
- ☐ Add a scheduled “Content Scheduling Day” to your July and October calendar for Q3/Q4.
- ☐ Build a checklist for Q1 so you’re ready to start right away in January.
- ☐ Ask AI to build a step-by-step checklist to guide your quarterly content scheduling days.

UTILIZE OUR GRAPHICS

Scan to view this month's social media graphics and share them to your social channels.



AVAILABLE TUTORIALS



CREATING & ORGANIZING A CONTENT LIBRARY

How to structure folders for different purposes and store templates for fast reuse.

USING AI TO PLAN A YEAR OF CONTENT

How to prompt AI for monthly themes, weekly topics, and draft captions then adjust output to match your brand voice and quarterly targets.

SCHEDULING CONTENT IN YOUR SOCIAL MEDIA POSTING TOOL

How to upload graphics and captions for January–June, stagger posts by type, and review scheduled content for balance and consistency.

THIS MONTH'S POP-BY IDEAS AND ASSETS



CHEERS TO A NEW YEAR

Mini bottle of sparkling cider or non-alcoholic bubbly:

"Wishing you a bright start to the new year — I'm here for any home goals you're planning in the future."



JOYFUL & BRIGHT AT HOME

Small holiday candle or ornament:

"Thank you for being a special part of my business this year — wishing you a warm and joyful season at home."



PLAN BIG FOR THE NEW YEAR

Branded mini desk calendar or notepad:

"If this year might include a move, remodel, or investment, I'd love to help you plan it out."

MASTER RESOURCE INDEX

JANUARY

- Bio Builder
- Creating Canva Folders
- Social Scorecard
- Profile Update Guide

FEBRUARY

- How to Create a Landing Page
- Running an Ad Campaign in Listing To Leads
- Introducing Canva for CB

MARCH

- Removing Backgrounds in Canva
- Building a Content Library from Canva

APRIL

- RPR® Seller's Report Walkthrough
- Creating a Resume in Canva
- Building a Listing Presentation

MAY

- RPR® Market Report Basics
- Creating Canva Templates
- Building Landing Pages in MoxiWebsites®
- How to Turn Blog Content into Reels

JUNE

- Importing Contacts into Your CRM
- Sending Review Requests
- Designing Testimonial Graphics
- Scheduling Testimonial Content

JULY

- Creating & Managing Groups in Moxi
- Updating Client Records
- Subscribing Groups to Campaigns
- Pre-Scheduling Follow-Ups in Your CRM

AUGUST

- Building Client Stages Inside Your CRM
- Managing Automated Campaigns in Moxi
- Using Triggers to Categorize Clients
- Testing Campaigns before Going Live

SEPTEMBER

- Using AI to Define Your Differentiation
- Segmenting Your Target Audience
- Creating Core Brand Messaging with AI
- Personalizing Coldwell Banker Templates
- Creating a Simple Brand Reference Sheet

OCTOBER

- Using RPR to Generate Local Market Reports
- Turning Market Data into Social Content
- Cross-Market Demand vs. Move Meter®
- Move Meter® Comparison Graphics

NOVEMBER

- Understanding Your Marketing ROI
- Budgeting for Real Estate Marketing

DECEMBER

- Creating & Organizing a Content Library
- Using AI to Plan A Year of Content
- Scheduling Content in Your Posting Tool

