

Marketing Checklist for Interactive and Lead Generation Activities

Rita Santamaria, CEO and Founder

Annual client gathering/event (at least once per year)

Establish and work a geographic farm area (what is your territory?)

Establish and work a demographic farm area (by age, activities, community involvement)

Establish and work your business farm area (centers of influence or those persons who already know you and want to do business with you because they already trust you)

Expand your personal sphere of influence

Regular phone calling and or texting, when permission is given - (Potential clients whom you've met but have not yet established a business relationship)

Telephone contact with centers of influence (those people who know you)

Consistent contact with expired listing owners and FSBO's

Develop and work a referral group, aka, networking group

Conduct buyer and seller seminars

Establish a chat line for yourself and company

Developing and Sustaining Your Brand - task oriented activities

Email to your farm

Direct mail to your farm

Updating your online profile

Create a print brochure

Personal advertising budget and implementation

Newspaper advertising both online and perhaps print (print is based on the size of the community you farm and what the local method for keeping in touch with the community offers)

Contests and giveaways

Develop your monthly newsletter

Develop a direct mail newsletter for a target market

Write 10 personal notes per week

Volunteer for marketing and recruiting events

Attend local and national conventions

Take a class and practice buyer-seller objections and how to handle negotiations with clients

Be active in association activities

Run or volunteer for an office in the community that is non-controversial such as a food bank, homeless shelter, charity league, township, church, and such

Attend your company office meetings and special events as this demonstrates you are a team player and you will learn information from what is being presented in the meeting

Tour local listings for market knowledge

Attend training courses and designation course offerings – “the more you learn, the more you earn” ...that is a fact!

Update your professional image and pictures

Hire a personal or virtual assistant

Read professional books including trade, industry, self-help and current best sellers (best sellers are good conversation with clients)

Master a new computer software

Tools and Resources to Build and Sustain Your Business

I Use Now

I Will Use Soon

- Current data base to manage client contacts
- 10 personal handwritten notes per week
- Open houses
- Personal brochure
- Deliver client packages personally or use overnight mail
- Attend at least one training session per month to improve skills
- Contact past clients consistently
- Telemarketing campaigns
- Homebuyer seminars
- Direct mail to target markets
- Co-marketing with affiliates and associated professionals – who would those, is? _____
- Magazine and newspaper ads
- Mail note pads and other specialty items to farm
- Financial options perhaps prepared by lenders for listings
- Quick response e-mail and text messages
- Consistent branding across all platforms
- Regular website updates
- Buyer pre-approval prior to showings
- Contributions to online forums
- Blog posts
- Structured listing presentation (one that can be picked up on short notice and carry you through a presentation to the seller with only the specifics on his house that needs to be added)
- Video marketing
- Advertising campaign in place for the year
- Online feedback and reviews
- Pay per click advertising

Marketing Budget and Accountability Worksheet

First Quarter:

New Year's Cards	\$	
Open house invitations	\$	Use for 2 nd , 3 rd , 4 th quarters
Listings, sold, announcements	\$	Use for 2 nd , 3 rd , 4 th quarters

Personal marketing plan for advertising myself/co.	\$	Use for 2 nd , 3 rd , 4 th quarters
10 open houses	\$	Use for 2 nd , 3 rd , 4 th quarters
Face to face meetings	\$	Use for 2 nd , 3 rd , 4 th quarters
Other	\$	Use for all other quarters
Total <u>Annual Money Needed</u> for Marketing:	\$	_____

Monthly Marketing Calendar:

Include: 1) mailings that will be sent, 2) events you will sponsor, 3) drop-offs to customers, 4) items of value needed for visits/sponsorships

Time spent \$ Spent # in attendance # of Sales from activity

January: _____

February: _____

March: _____

April: _____

May: _____

June: _____

July: _____

August: _____

September: _____

October: _____

November: _____

December: _____
