



Smart Real Estate Tools Marketing Planner



STAGE ONE:

- CREATE YOUR BRAND
- SET YOUR GOALS (SHORT & LONG TERM)
- CREATE YOUR MESSAGE

STAGE TWO:

- LEAD SOURCES & TOOLS
- MARKETING CHECKLIST
- EASY FOLLOW UP SCRIPT

STAGE THREE:

- CREATE A DETAILED BUDGET
- WEEKLY MARKETING TO DO LISTS

RESOURCES:

- LEAD SOURCES, TOOLS & SYSTEMS SAMPLE • MARKETING PLAN





INTRODUCTION

To keep it super simple, there are two main things your marketing plan should do:

1. Find people that are looking to sell or buy a home
2. Get them to use you to do it (Branding, Lead Generation, Referrals
(past client and your sphere of influence (SOI))

These are the two things you need to figure out...That's it! If you can accomplish the two things above, you will have a rewarding and fulling time being a real estate agent. However, in order to get this done, you have to have your ducks in a row, be flexible, and follow the systems, tools and services in SRETools.com. First, here is a little education...



STEP ONE | CREATE YOUR BRANDING

So, to create your brand all you need are these things:

- Head Shot Picture [UPLOAD]
- Logo [UPLOAD]
- Tag Line [Fill in the form field]
- Font Type [Fill in the form field]
- Color Pallet [Choose from 5 options]
- Biography [Fill in the form field]
- Bonus: Video Biography

Saves to the Members Database Area

SET YOUR GOALS

A good goal is to achieve a minimum of either 8 transactions or \$4 million in total sales volume, or \$75,000 net commission in a twelve month period. How can you make this happen?

Number of Buyers: _____ Sales Volume Goal: _____

Number of Sellers: _____ Average Price Goal: _____

Total Number of Deals Closed Goal: _____ Average Commission Goal: _____

Gross Income goal: _____



Smart Real Estate Tools

CREATE YOUR MESSAGE | LEAD SOURCES, TOOLS & SYSTEMS

Since your brand is you, you need to create a message that explains your best character traits and ask the questions:

- What make you unique?
- What would compel buyers and sellers to choose you over other talented and experienced agents?
- Can you communicate your brand message with passion and clarity?

To help you we have provided descriptive words below. Please check the ones that align with your who you are or your brand.

- | | | |
|--|---------------------------------------|--------------------------------------|
| <input type="checkbox"/> Bold | <input type="checkbox"/> Credible | <input type="checkbox"/> Efficient |
| <input type="checkbox"/> Sincere | <input type="checkbox"/> Rational | <input type="checkbox"/> Reliable |
| <input type="checkbox"/> Honest | <input type="checkbox"/> Persistent | <input type="checkbox"/> Selective |
| <input type="checkbox"/> Exclusive | <input type="checkbox"/> Dutiful | <input type="checkbox"/> Considerate |
| <input type="checkbox"/> Fearless | <input type="checkbox"/> Service | <input type="checkbox"/> Superior |
| <input type="checkbox"/> Brave | <input type="checkbox"/> Advocate | <input type="checkbox"/> Thoughtful |
| <input type="checkbox"/> Trustworthy | <input type="checkbox"/> Authority | <input type="checkbox"/> Devoted |
| <input type="checkbox"/> Respectful | <input type="checkbox"/> Capable | <input type="checkbox"/> Principled |
| <input type="checkbox"/> Caring | <input type="checkbox"/> Compelling | <input type="checkbox"/> Dedication |
| <input type="checkbox"/> Luxurious | <input type="checkbox"/> Persuasive | <input type="checkbox"/> Loyal |
| <input type="checkbox"/> Chic | <input type="checkbox"/> Competent | <input type="checkbox"/> Accurate |
| <input type="checkbox"/> Elegant | <input type="checkbox"/> Professional | <input type="checkbox"/> Dependable |
| <input type="checkbox"/> Authentic | <input type="checkbox"/> Accomplished | <input type="checkbox"/> Likable |
| <input type="checkbox"/> Genuine | <input type="checkbox"/> Qualified | <input type="checkbox"/> Charming |
| <input type="checkbox"/> Direct | <input type="checkbox"/> Talented | <input type="checkbox"/> Fun |
| <input type="checkbox"/> Outspoken | <input type="checkbox"/> Skilled | <input type="checkbox"/> Outgoing |
| <input type="checkbox"/> Straightforward | <input type="checkbox"/> Responsible | <input type="checkbox"/> Magnetic |
| <input type="checkbox"/> Legitimate | <input type="checkbox"/> Keen | <input type="checkbox"/> Passionate |
| <input type="checkbox"/> Devoted | <input type="checkbox"/> Composure | <input type="checkbox"/> Secure |

Use the words you checked from the previous page to answer these questions as the stepping stone to creating your message.

What do your clients appreciate about you the most?

What's your promise to your clients?

What makes you different from other agents?

What are the most important things you do for your client?

Write Your Brand Message

Use the previous to write out your brand message. Keep in mind that this message is what you want to be known for and what your reputation is built upon. Your message is the foundation of your real estate business.

Example:

“I provide my clients with highly-personalized, hassle free home buying (selling) experience. This exceptional client service is made possible by an exclusive process I've developed over ___ years of experience as a real estate professional. This process and my sincere devotion to client advocacy ensures my client have the best possible transaction.”

Write your brand message:

STEP TWO | LEAD SOURCES & TOOLS

What Methods do you use to prospect now?

How Many contacts do you make a week now? -----

Which systems to you want to add to achieve your next year's goal?

- | | |
|--|--|
| <input type="checkbox"/> Expired Listings | <input type="checkbox"/> Smart Farm |
| <input type="checkbox"/> For Sale By Owners | <input type="checkbox"/> Smart Lender Leads |
| <input type="checkbox"/> Smart Referrals | <input type="checkbox"/> Smart Donation Referral |
| <input type="checkbox"/> Smart Landing Pages | <input type="checkbox"/> Client Parties |
| <input type="checkbox"/> Open Houses | <input type="checkbox"/> Business to Business |
| <input type="checkbox"/> Database Mining & SOI | <input type="checkbox"/> SRE Tools Membership |
| <input type="checkbox"/> Smart Solar | <input type="checkbox"/> Working with past clients |
| <input type="checkbox"/> Facebook / Social Media | |
| <input type="checkbox"/> Networking | |



YOUR SMART MARKETING PLAN CHECKLIST

- ☐ 1. Finish your brand
- ☐ 2. Design your print collaterals
- ☐ 3. Set up your farm & post card mailer(s)
- ☐ 4. Set up all the lead generation landing pages you want to participate in
- ☐ 5. Set up your lender referral network (3 minimum)
- ☐ 6. Set up your CRM & connect the above checked assets
- ☐ 7. Set up your Marketing Automation email nurture campaigns
- ☐ 8. Establish your overall marketing budget (farm, digital, referral)
- ☐ 9. Practice our easy follow up script

Here is are simple script example...

Lender: Hi, may I speak to Mr. Jones please.

Lead: This is he.

Lender: Hi, Mr. Jones, this XYZ lender calling you from an online survey you filled out today. Do you remember doing that?

Lead: Yes.

Lender: It says here that you would like to get your loan pre-approval and free appraisal...do you still desire to do this?

Lead: Yes.

Lender: Great, then the first step is...



WEEKLY MARKETING TO DO LIST

WEEK ONE

MON: _____

TUES: _____

WED: _____

THUR: _____

FRI: _____

SAT: _____

SUN: _____

WEEK TWO

MON: _____

TUES: _____

WED: _____

THUR: _____

FRI: _____

SAT: _____

SUN: _____

WEEK THREE

MON: _____

TUES: _____

WED: _____

THUR: _____

FRI: _____

SAT: _____

SUN: _____



STAGE THREE | START-UP-CASH

How much start-up cash do you have available for marketing? \$_____

MARKETING BUDGET

| | January | February | March | April | May | June | July | August | September | October | November | December | TOTAL |
|-----------------------|---------|----------|-------|-------|------|------|------|--------|-----------|---------|----------|----------|-------|
| PRINT | | | | | | | | | | | | | |
| Postcards | | | | | | | | | | | | | \$ - |
| Newsletters | | | | | | | | | | | | | \$ - |
| Letters | | | | | | | | | | | | | \$ - |
| Listing Brochures | | | | | | | | | | | | | \$ - |
| Listing Flyers | | | | | | | | | | | | | \$ - |
| PRINT TOTAL | | | | | | | | | | | | | \$ - |
| Other | | | | | | | | | | | | | \$ - |
| Other | | | | | | | | | | | | | \$ - |
| PRINT TOTAL | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| ONLINE | | | | | | | | | | | | | |
| SRETools Membership | | | | | | | | | | | | | \$ - |
| SRETools On Demand | | | | | | | | | | | | | \$ - |
| Landing Pages | | | | | | | | | | | | | \$ - |
| Smart CRM | | | | | | | | | | | | | \$ - |
| Smart Market Boost | | | | | | | | | | | | | \$ - |
| Other | | | | | | | | | | | | | \$ - |
| Other | | | | | | | | | | | | | \$ - |
| ONLINE TOTAL | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| IN PERSON | | | | | | | | | | | | | |
| Open Houses | | | | | | | | | | | | | \$ - |
| Promotional Parties | | | | | | | | | | | | | \$ - |
| Coffee Meetings | | | | | | | | | | | | | \$ - |
| Broker Pitch Sessions | | | | | | | | | | | | | \$ - |
| Other | | | | | | | | | | | | | \$ - |
| Other | | | | | | | | | | | | | \$ - |
| IN PERSON TOTAL | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| OVER TOTALS | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |

LEAD SOURCES, TOOLS & SYSTEMS

To generate leads, you need to first determine the different ways to generate leads, and then choose the ones that resonate with you and your budget. Here is a list of lead sources:

1. Farming

- Post Cards Mailers (SRETools)
- Door Hangers (SRETools)
- Flyers (SRETools)
- Door Knocking
- Community Involvement

2. Digital Marketing

- Social Media Ads (SRETools Market Boost) combined with SRETools Landing Pages:
- Smart Agent Leads.com - Co-Branded IDX Home Search
- Smart Owners PayOne.com - 1% Performance Listing
- Smart Instant Offers.com - DIY Offer Tool
- What's Your Smart Home Worth.com - Valuation Widget
- Agent's IDX Website
- Marketing Automation - Email Nurture Campaigns connected to Ad Campaign
- Each campaign has survey quiz associated with it to create the permissive lead

3. Listings

- Open House Visitor Check-ins
- House Warming Parties

4. Referrals


- Sphere of Influence
- Past Clients
- Networking
- Community / Volunteering
- Chamber Sponsors

5. Joint Marketing Co-Op

- Combining email databases (example: Lender & Agent or Business & Agent)

6. Reciprocity

- The practice of doing something for somebody and them feeling the need to reciprocate or do something for you like refer business
1. Media Ads:
 1. Bus Bench
 2. Grocery Cart
 3. Car Magnets
 4. TV Commercials
 5. Radio Ads



On the next page is our sample marketing plan. It is designed to get you going with the basics and you can always add more lead generating assets as you go. Please feel free to print it out and follow it or use this as a template to develop your own.

DIGITAL MARKETING



SAMPLE MARKETING PLAN - GETTING STARTED TO DO

1. Sign up for SRETools - Real Estate Membership...Join <https://sretools.com/membership-base-plan/>
2. Go to the "Member Area" tab on your Dashboard. Watch the video and go through the Business Plan and Marketing Plan Workbooks. This is the on-boarding process that will help you establish your brand and ask you some specific questions about you and what differentiates you from others, etc.
3. Go to the "Smart CRM" tab on your Dashboard - This is the CRM and Market Automation tool...Set it up: SmartCRM.com

Note: This is important because all your leads need to go to a place where you can manage them and follow up with them properly. The automation component generates a very important first email or a text link that thanks them for their inquiry and provides a link to your bio and the "stage of readiness" survey. This first message is designed to start building the trust and competency needed for conversion and, to help create permission for easy follow-up.

1. Go to the "Branding" tab - Set up your brand and collaterals.
2. Go to the "Leads" tab

1. Set Up Your Farm

1. Choose your farm area
2. Add SmartOwnersPayOne.com - 1% Performance Listing System
3. Add TheSmartOfferPlatform.com - The semi-transparent offer submission platform
4. Under "Marketing" on your Dashboard, create the branded direct-mail post card.
This will be tied to your 1% Performance Listing system for selling homes URL
5. Make sure your CRM is synced with SmartBuyersPayOne.com for all opt ins

2. Set Up Digital Assets & Market Boost (Digital Marketing Done For You)

1. Go to "Leads" Choose the type of landing pages you want
2. Add SmartAgentLeads.com
3. Choose your Smart Market Boost budget
4. Make sure you CRM is synced with the tool(s) you choose

In closing, we have created this simple Smart Marketing Plan that will help you brand yourself and create some permission based leads. You can always increase your ad spend or add more landing pages as your marketing budget dictates. Don't forget to take advantage of the lead generation marketing strategies for when you market your listings.

So, make sure you remember that selling is all about how you can help (become a value) people buy or sell homes. Continue to build your value/brand, create those mental triggers, build your database, ask for referrals, service your clients with a great attitude, don't be an undercover agent and enjoy building your real estate business!