

☰ SUMMER REAL ESTATE BUSINESS CHECKLIST

Update your real estate business for summer with this easy-to-follow checklist.

Create or update your lead generation systems.

- ☐ Subscribe to relevant real estate news sources and data sites
 - ☐ Use the information your clients would be interested in from the above sources in
 - ☐ Email drip campaigns
 - ☐ Direct Mail Marketing pieces (*We have current market updates.*)
 - ☐ Social media posts (*Use our free seasonal social media posts!*)
 - ☐ Monthly or Quarterly newsletters
- ☐ Join 1-3 real estate related online message boards
 - ☐ Schedule a weekly check in to respond to questions using your community member hat
 - ☐ Look for posts or questions related to your neighborhoods
 - ☐ Share timely updates about community events or seasonal home/yard maintenance
 - ☐ Share updates pertaining to any changes in laws that may affect your homeowners
- ☐ Articles or blog on your website
 - ☐ Creating fresh content on your website is one way to keep your website current in search engine ranking
 - ☐ Share at least monthly about current events, seasonal homeowner updates, or local ordinance changes (*Use our free seasonal newsletter articles!*)
- ☐ People still love receiving handwritten notes
 - ☐ Schedule to send out handwritten notes to your favorite clients at least twice a year
 - ☐ Pick holidays or occasions that are significant for your client
 - ☐ Use quality note paper, cards, and envelopes. Your clients can feel the difference.
 - ☐ Remember to thank your clients and ask for referrals.

- ☐ Conduct an inventory of your website
 - ☐ Make sure your contact information is current
 - ☐ Are people able to contact you easily?
 - ☐ Update or remove information that is older than 12 months

Create or update your referral management system.

- ☐ Create or update a system for people who may refer business to you
 - ☐ Include your past clients, business associates, friends, and family
- ☐ Request client feedback about their experience working with you
 - ☐ Include this positive feedback on your emails, newsletters, and direct mail pieces
- ☐ Reach out to past clients twice a year with a gift of a recipe or current market report and thank them for their referrals

Complete general business maintenance for the quarter.

- ☐ Review and update your business plan, have your goals changed?
- ☐ Review and update your marketing budget and plan
- ☐ Add all upcoming community networking events to the calendar
- ☐ Add all upcoming club or association networking events and changes to the calendar

