



# 12-Month Marketing Plan

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# We are SmartZip

The top lead generation resource for realtors who are ready to prospect smarter. Through a combination of predictive algorithms, data analytics and automated marketing, SmartZip makes it easy for realtors to find and win seller leads.

Get leads

## How we predict the future

With statistical algorithms and machine learning techniques we can predict the likelihood of future outcomes based on historical data. And it works, we predicted 72% of listings last year in the United States. No big deal.

Our goal is to go beyond knowing what has happened to provide the best assessment of what will happen in the future. And that is what this 12-Month Marketing Plan is going to help you do.

## Putting it all into action

Our full suite of powerful analytics, marketing, recruiting, and data tools is purpose-built to give you and your team a competitive edge, boosting your productivity and driving more transactions. Take advantage of the what's available to you, so [sign up for a demo today](#) to find out how SmartZip's comprehensive tools can help you.

# First steps to get started

To make the most of the marketing plan, we recommend having your branding assets and current farm list on hand. Also, think about what has worked for you in the past, and ask yourself how you can take it to the next level.

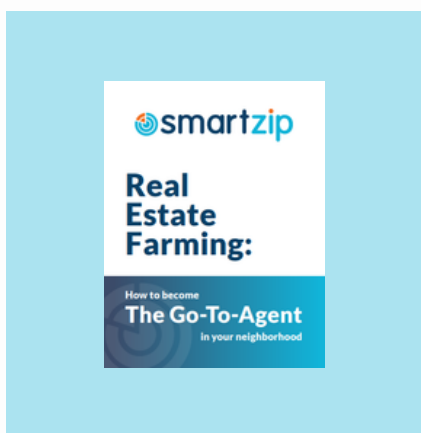
Finally, you should already have established business goals, a unique selling point (USP), and you should be zeroed in on your farm. If you think you need a refresh, we encourage you to dive into the free guides below. They will help you immensely as we hone your marketing strategy throughout the year!



## Real Estate Business Plan

Outline the vision, goals, basic financial plan, specific tactics, and other planning decisions to guide your investments and overall strategy for growth.

[Click here](#)



## Guide to Geo-Farming for Real Estate Agents

Tips and insights on why farming will help grow your business and what to consider when building your farm.

[Click here](#)

# Keeping up with market changes

It is inevitable that the market will shift throughout the course of a year, which is why it is important to have a strong (and sustainable) marketing strategy. The less you can rely on the ups-and-downs of the market, the better. That is not to say you can ignore what is happening in the market - just don't let it control your business.

Whenever you are creating marketing collateral, whether you are targeting potential buyers or sellers, consider their needs based on how the market is performing and how can you solve their problems.

## Grow your toolkit

Our second piece of advice is to not rely too heavily on one marketing method. Which is why, throughout your 12-Month Marketing Plan we encourage you to utilize digital and print farming methods, social media marketing, and building your online reputation through an SEO optimized referral site.

By diversifying your marketing channels, you'll have variety and creativity in your strategy; helping you monitor and manage the success and ROI of your campaigns, experiment and discover new tactics, and bring you closer to achieving your goals.

[Our tools](#)

# Weekly Social Media Content Calendar & Content Ideas

Social media marketing holds huge potential for realtors that are willing to try new methods of generating leads. Here are [some content](#) ideas to help you get on the fast-track towards sustainable social media success.

S	M	T	W	T	F	S
	Self-Promo Post		Real Estate Advice		Listing & Sold Promo	

## Self-Promo Content Ideas

**Week 1:** Share your extensive background

**Week 2:** Share client testimonials

**Week 3:** "5 things you may not know about me"

**Week 4:** Promote your strengths

## Real Estate Advice Content Ideas

**Week 1:** How the current market benefits for buyers/sellers

**Week 2:** First steps to buying/selling a home

**Week 3:** How to save money when buying a home

**Week 4:** 5 reasons why you should consider selling

## Listing & Sold Promo Content Ideas

**Week 1:** Share a successful sale (representing buyers/sellers)

**Week 2:** Promote an open house or recent listing

**Week 3:** Share a successful sale (representing buyers/sellers)

**Week 4:** Promote an open house or recent listing

# How to Use The Marketing Plan

Along the way, we will introduce you to new strategies and techniques that can be used and built upon throughout the year. Like setting up engaging email funnels to your top prospects, or implementing a high converting mailing system. And, to ensure results, our main piece of advice is to make the Marketing Plan work for you and your business.

## Make a checklist

So, before diving in, make goals for yourself; whether it is number of new listings/month or ROI, it can be anything that is going to push you forward and encourage you to expand your marketing methods. Then, break down these goals into monthly action items that you will implement throughout the year.

## Revisit and Reevaluate

You will see that each month has a section for you to make notes of top priorities and action items, this is where we encourage you to jot down your business goals. It will also be helpful to take inventory at the beginning of each month of progress and ideas you have to take your marketing one step further.

The best part about marketing is that if something does not give you the results you'd hoped, you then have data that you can use to make it better. Luckily, there is no messing up here. The most important thing is that you remain consistent and confident, as this does take time!

# January

**PRO TIP!** Use the blank lines to add personal business goals & action items!

## Monthly Goals

- .....
- .....
- .....

New year means new opportunities. This month is all about testing the waters and beginning to make the first touch with your SOI. Make a great first impression with a handwritten letter and set up a Lead Capture Site to reach potential buyers & sellers as they make their real estate goals for the New Year.

## Observed Holidays:

- New Year's Day
- Martin Luther King Jr. Day

## Upcoming Holidays:

- Valentines Day
- Presidents Day



Subscribe to receive market updates, and real estate tips and insights.

## Action Items

- [Start a Handwritten Letter to SOI & Farm Area](#) .....
- [Launch Facebook, Instagram & Google Ads](#) .....
- [Send a "Thank you" Card to Previous Clients](#) .....
- [Launch a Leads Capture Site](#) .....
- [Schedule Social Media Content](#) .....
- .....



Is your home worth more than you think?

Home prices in your neighborhood have changed. Find out what your home could sell for in today's market!

Key location address  [GET STARTED](#)

And INSTANTLY receive:

- Your home price**  
Whether you are thinking of selling or
- Recently sold homes nearby**  
See the recently sold homes near you.
- Local market trends**  
Get trusted advice about local market

## Lead Capture Site

Grow your brand and instantly generate leads by sending high-ranking homeowners their home valuation and CMA

[Click here](#)

Randy Beaman  
228 South First Street  
San City, CA 12345

Dear Randy,

*Hey Randy,  
Below is a personalized access code just for you. Let me know what you think of your online home value, and contact me with any questions.*

Lucas ipsum dolor sit amet lars luke darth twilek han c-3p0 darth mustafar organa skywalker. Kamino yoda padmé amidala secura. Dantooine calrissian darth organa jade biggs. Mon jade grievous hutt calrissian. Solo skywalker skywalker yavin han skywalker. Alderaan organa greedo solo moff gonk jinn. Wicket fett ben jar organa qui-gon k-3po. Darth darth moff hutt darth hutt bothan moff. Birks ahsoka darth boba mara ahsoka ahsoka. Mandalorians amidala darth chewbacca chewbacca. Padmé fisto sidious chewbacca luke fisto kessel mandalore.

Jade moff chewbacca skywalker. Kenobi amidala skywalker skywalker moff binks lando dooku boba. Yavin kamino conuscant bothan hutt han ben baba palpatine. Calrissian jade k-3po leia obi-wan organa yoda darth. Darth yoda obi-wan lando hutt. Skywalker mustafar dagobah darth k-3po mon kenobi. Calamari skywalker antilles anakin mandalore ben. Dagobah antilles c-3p0 leia darth endor ahsoka.

May the force be with you.

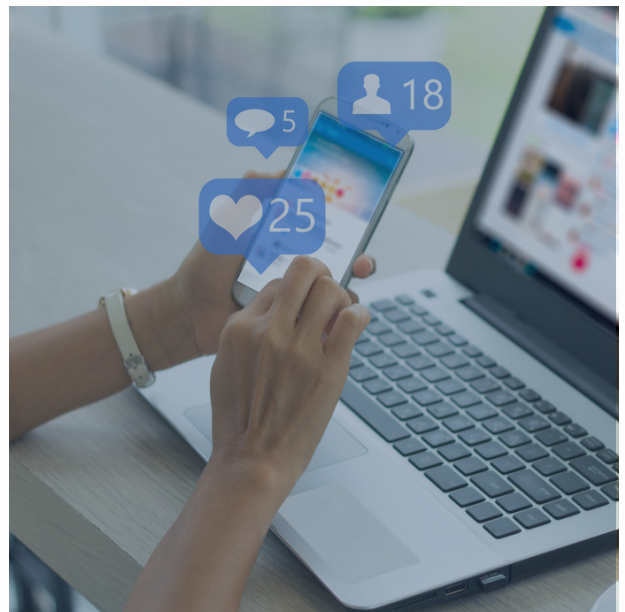
## Handwritten Letters

Select from hundreds of rich, pre-designed postcard templates, so you can match your message to your audience

[Click here](#)

Don't miss opportunities. Take advantage of today's incredible sellers' market.

[Download Complimentary Social Media Content →](#)



[Learn How to Build The Perfect Social Post →](#)

# February

**PRO TIP!** Reuse social media content on postcards & email campaigns!

## Monthly Goals

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As the holiday season is officially passed and spring is right around the corner, buyers and sellers are in the perfect place to go from prospects to clients. This month, be front and center. Observe the market, what are buyers and sellers needing right now? What is something that is holding them back? Send out a postcard with solutions and launch Google Ad Campaigns to drive traffic.

## Observed Holidays:

- Chinese New Year
- Groundhog Day
- Valentine's Day
- President's Day

## Upcoming Holidays:

- Daylight Savings Time Begins
- St. Patrick's Day
- Spring Begins

## Action Items

[Send a High-Value Offer PC to SOI & Farm Area](#)

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[Launch Facebook, Instagram & Google Ads](#)

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[Follow-Up with Leads](#)

.....

[Schedule Social Media Content](#)

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## Online Ads

Across Facebook, Instagram, and Google, our cookie-matching technology locates your top prospects for high conversions.

[Click here](#)



## High-Value Offer Postcard

Select from hundreds of rich, pre-designed postcard templates, so you can match your message to your audience

[Click here](#)



[Download Complimentary Social Media Content →](#)

[Real Estate Farming Ideas to Stand Out →](#)

# March

## Monthly Goals

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Get the attention of your Geographic Farm, and get them motivated because now is the perfect time to buy or sell. Show them why they should work with you by sending out a self-promotion postcard that boasts your USP. Then, one-up the competition with a Home Trends Report lead capture site. Finally, check in on your [social media strategy](#) and plan content each week!

## Observed Holidays:

Mardi Grad Begins  
Daylight Saving Time Begins  
St. Patricks Day

## Upcoming Holidays:

Easter  
Earth Day

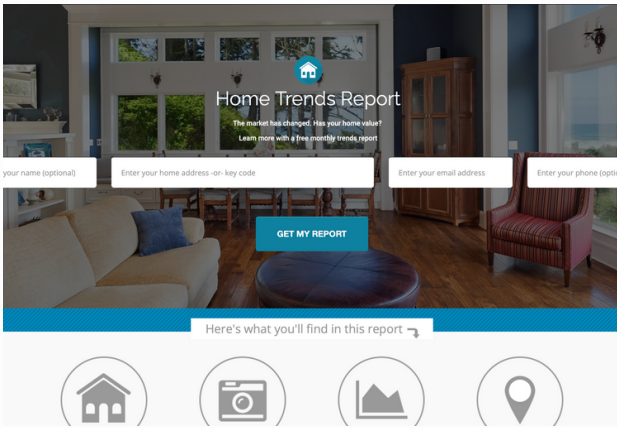
## Action Items

[Send out a Self-Promo PC to SOI & Farm Area](#)

[Launch Facebook, Instagram & Google Ads](#)

[Launch a Leads Capture Site](#)

[Schedule Social Media Content](#)



## Home Trends Capture Site

Grow your brand and convert leads by sending homeowners monthly neighborhood reports, simplified!

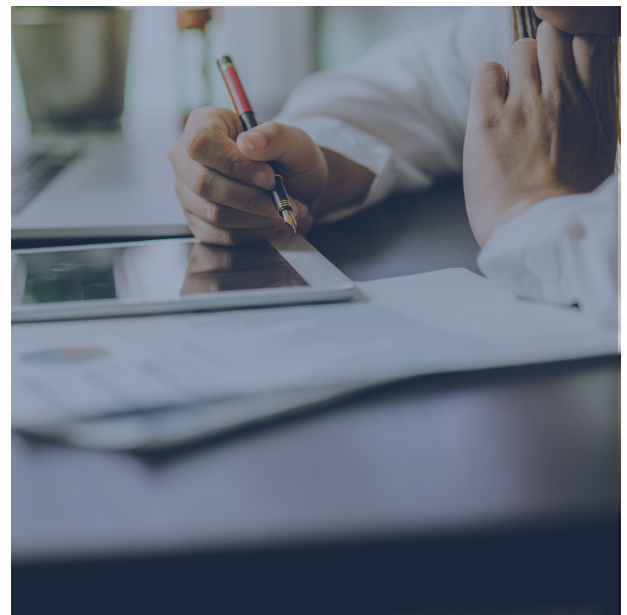
[Click here](#)



## Self-Promo Postcard

Select from hundreds of rich, pre-designed postcard templates, so you can match your message to your audience

[Click here](#)



[Download Complimentary Social Media Content →](#)

[Give Your Marketing Funnel An Upgrade →](#)

# April

**PRO TIP!** By diversifying your online presence you can be found easier!

## Monthly Goals

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Let's check in on your online presence. When you type your name into Google, what is the first thing that pops up? If you think that posting on social media is enough, think again. This month, spruce up your digital presence with new referrals. In addition to your site, welcome spring with an inviting handwritten postcard!

## Observed Holidays:

Easter

Tax Day

Earth Day

## Upcoming Holidays:

Mother's Day



Subscribe to receive market updates, and real estate tips and insights.

## Action Items

[Start a Handwritten Letter to SOI & Farm Area](#)

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[Launch Facebook, Instagram & Google Ads](#)

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[Request Referrals with Email Campaign](#)

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[Schedule Social Media Content](#)

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## Referral Collection

Easily request recommendations from clients. As recommendations are received, they are published to your Reach150 page.

[Click here](#)



## Handwritten Letters

Select from hundreds of rich, pre-designed postcard templates, so you can match your message to your audience

[Click here](#)



[Download Complimentary Social Media Content →](#)



[Activate Your Sphere of 150 Influencers →](#)

# May

**PRO TIP!** Include a CTA at the end of social media posts to get more leads!

## Monthly Goals

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Summer is almost here! Which means family's have 3 months to move before the kids go back to school! This is a great opportunity to be the first through the door. Try catching their attention by promoting a high-value offer on a postcard. In addition, launch an email campaign sharing reasons why summer is the perfect time to buy or sell a home.

## Observed Holidays:

Mother's Day  
Memorial Day

## Upcoming Holidays:

Father's Day  
Summer Begins



Subscribe to receive market updates, and real estate tips and insights.

## Action Items

[Send a High-Value Offer PC to SOI & Farm Area](#)

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[Launch Facebook, Instagram & Google Ads](#)

.....

[Launch an Email Campaign to SOI](#)

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[Schedule Social Media Content](#)

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## Email Campaign

Leverage your contacts to generate email interactions. Select from one of our pre-created templates, or create your own

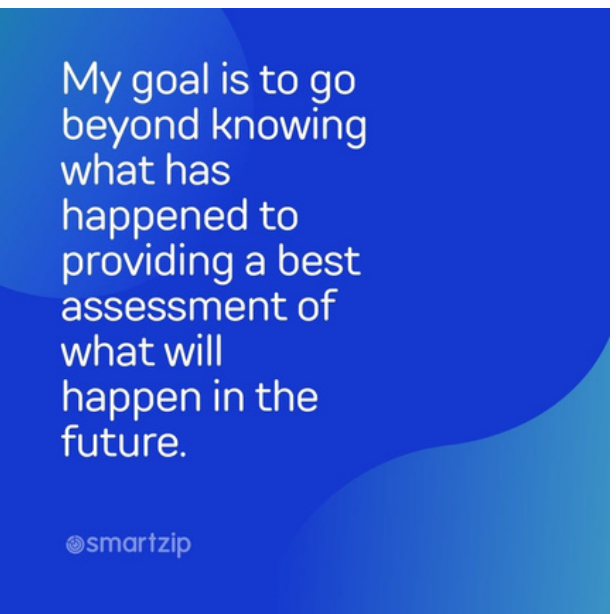
[Click here](#)



## High-Value Offer Postcard

Select from hundreds of rich, pre-designed postcard templates, so you can match your message to your audience

[Click here](#)



[Download Complimentary Social Media Content →](#)

[What is Smart Targeting & How to Use It →](#)

# June

## Monthly Goals

How are things going? Ready to do more to grow your business by doing less? Automation will be your secret weapon, and that is where [Smart Targeting](#) comes in. This month, activate a Smart Home Price lead capture site, designed to convert real estate seller prospects. Then, make a great first impression with a high-value offer postcard. Focus on showcasing what is possible.

## Observed Holidays:

Flag Day

Juneteenth

First Day of Summer

## Upcoming Holidays:

Independence Day



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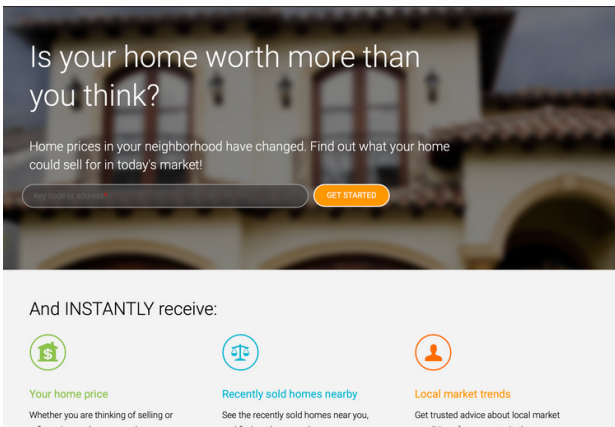
## Action Items

[Send a High Value Offer PC to SOI & Farm Area](#)

[Launch Facebook, Instagram & Google Ads](#)

[Launch a Leads Capture Site](#)

[Schedule Social Media Content](#)



## Home Price Capture Site

Grow your brand and instantly generate leads by sending high-ranking homeowners their home valuation and CMA

[Click here](#)



## High-Value Offer Postcard

Select from hundreds of rich, pre-designed postcard templates, so you can match your message to your audience

[Click here](#)



[Download Complimentary Social Media Content](#) →



[Get Seller Rankings On The Homeowners In Your SOI](#) →

# July

**PRO TIP!** Promote your USP as much as possible to build trust & stand out!

## Monthly Goals

- .....
- .....
- .....

So far, you have created a landing page, a referral site, launched Facebook and Google Ads, retargeted leads, and much more! This month check-in on your goals and track your progress. To get ahead, [download social media content](#) and plan your posts ahead of time. And, to reach a larger audience run a Google Ad with Reach150. And finally, promote your USP in a self-promo postcard!

## Observed Holidays:

Independence Day

## Upcoming Holidays:

Back to School



Subscribe to receive market updates, and real estate tips and insights.

## Action Items

- [Send a Self-Promo PC to SOI & Farm Area](#) .....
- [Launch Facebook, Instagram & Google Ads](#) .....
- [Follow-Up with Leads](#) .....
- [Schedule Social Media Content](#) .....
- .....
- .....



## Online Ads

Across Facebook, Instagram, and Google, our cookie-matching technology locates your top prospects for high conversions.

[Click here](#)



## Self-Promo Postcard

Select from hundreds of rich, pre-designed postcard templates, so you can match your message to your audience

[Click here](#)



[Download Complimentary Social Media Content →](#)



[6 Creative Farming Ideas to Stand Out →](#)

# August

## Monthly Goals

As the seasons are changing, homeowners may be looking for a change themselves! Introduce yourself and offer your expertise with a handwritten letter to your SOI. Also, leverage a pre-made referral request template. With [Reach150](#), asking for recommendations has never been easier. As they are received, we publish them to your Reach150 page - boosting SEO and rankings!

## Observed Holidays:

Senior Citizen's Day

## Upcoming Holidays:

Labor Day

Autumn Begins



Subscribe to receive market updates, and real estate tips and insights.

## Action Items

[Send a Handwritten Letter to SOI & Farm Area](#)

[Launch Facebook, Instagram & Google Ads](#)

[Request Referrals with Email Campaign](#)

[Schedule Social Media Content](#)



## Reach150 Recommendation

Leverage your contacts to generate email interactions. Select from one of our pre-created templates, or create your own.

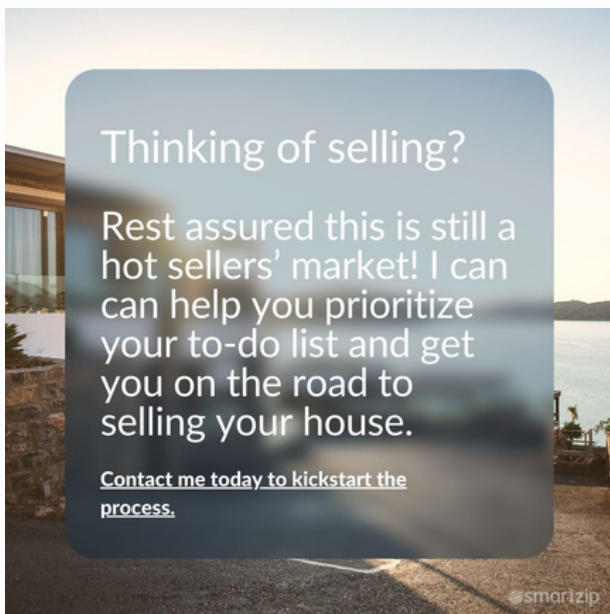
[Click here](#)



## Handwritten Letters

Select from hundreds of rich, pre-designed postcard templates, so you can match your message to your audience

[Click here](#)



[Download Complimentary Social Media Content →](#)



[A Shortcut to Winning More Listings →](#)

# September

**PRO TIP!** Use Google search for ideas on what your clients need help with!

## Monthly Goals

- .....
- .....
- .....

Some buyers and sellers may be slowed down by the start of the school year. Show up with the solutions to their problems with online ads and a high-value offer postcard. Express why the fall is a great time to buy by marketing successful sales and customer testimonials. This is a great way to get new clients through the door, who may have been reluctant to buy in the first place.

## Observed Holidays:

- Labor Day
- Rosh Hashanah Begins

## Upcoming Holidays:

- Columbus Day



Subscribe to receive market updates, and real estate tips and insights.

## Action Items

- [Send a High-Value Offer PC to SOI & Farm Area](#) .....
- [Launch Facebook, Instagram & Google Ads](#) .....
- [Follow-Up with Leads](#) .....
- [Schedule Social Media Content](#) .....
- .....
- .....





## Online Ads

Across Facebook, Instagram, and Google, our cookie-matching technology locates your top prospects for high conversions.

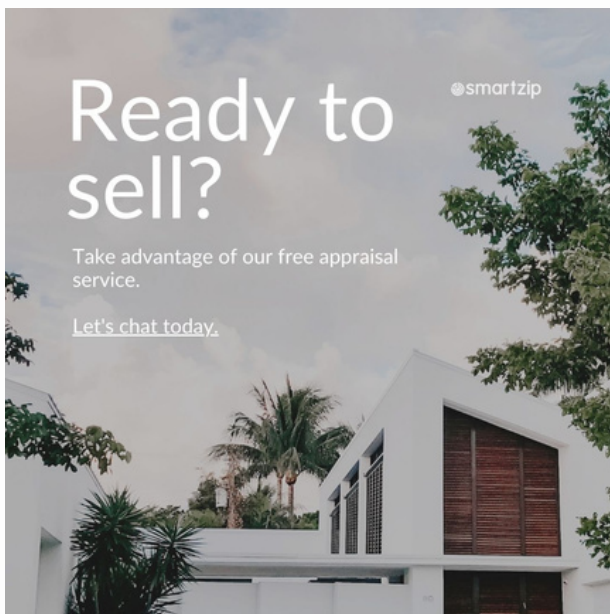
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## High-Value Offer Postcard

Select from hundreds of rich, pre-designed postcard templates, so you can match your message to your audience

[Click here](#)



[Download Complimentary Social Media Content →](#)

[Solutions to the 6 most Common Real Estate Farming Challenges →](#)

# October

## Monthly Goals

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This is the perfect time of year to keep the conversation going with high-value homeowners in your SOI. Capture leads with a Seller's Guide landing page. Then, set up automated emails and email drip campaigns that trigger based on a contacts behavior. By consistently delivering value, you are building trust with your leads. This is the secret recipe for turning leads into clients.

## Observed Holidays:

Yom Kippur Begins  
Columbus Day  
Halloween

## Upcoming Holidays:

Daylight Savings Ends  
Veterans Day  
Thanksgiving

## Action Items

[Set-Up Re-Engagement Email Campaign](#)

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[Launch Facebook, Instagram & Google Ads](#)

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[Launch a Leads Capture Site](#)

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[Schedule Social Media Content](#)

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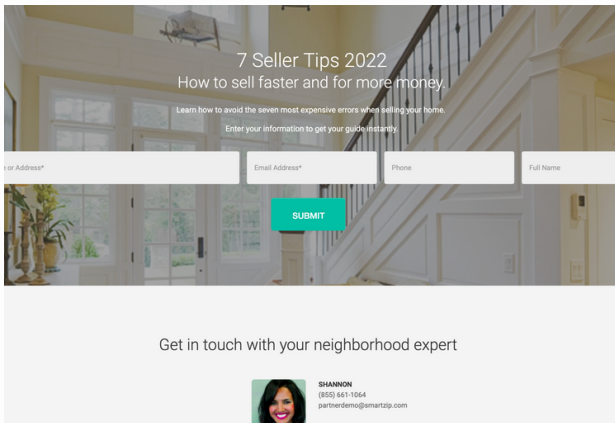
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## Email Campaign

Leverage your contacts to generate email interactions. Select from one of our pre-created templates, or create your own

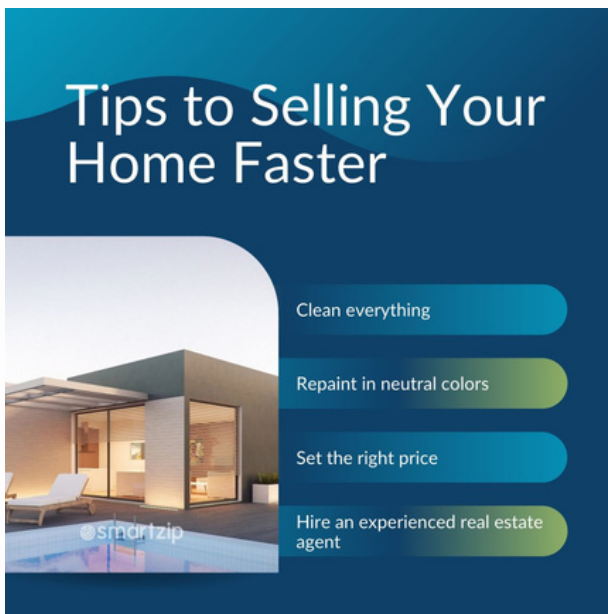
[Click here](#)



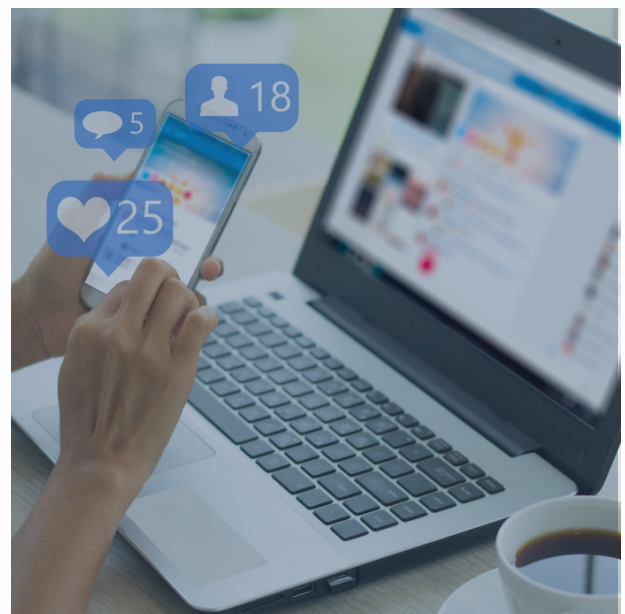
## Seller's Guide Capture Site

Grow your brand and instantly generate leads by sending high-ranking homeowners their home valuation and CMA

[Click here](#)



[Download Complimentary Social Media Content →](#)



[Why Agents Shouldn't Underutilize Online Ads →](#)

# November

**PRO TIP!** Be remembered, by sending a thoughtful letter & gift to past clients!

## Monthly Goals

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The holidays are here! Take advantage of this time to nurture leads and gain a larger base, so when the holidays are over you can hit the ground running! This month, run a Facebook and Instagram ad campaign with tips for buying or selling a home during the holidays, or tips for holiday home staging ideas. And, don't forget to show appreciation with a Happy Thanksgiving postcard. Make it personal and unique with a handwritten note or even a recipe!

## Observed Holidays:

- Daylight Saving Time Ends
- Veterans Day
- Thanksgiving

## Upcoming Holidays:

- Hanukkah
- Christmas
- Kwanzaa Begins

## Action Items

[Send Thanksgiving Card to SOI & Farm Area](#)

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[Launch Facebook, Instagram & Google Ads](#)

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[Follow-Up with Leads](#)

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[Schedule Social Media Content](#)

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## Online Ads

Across Facebook, Instagram, and Google, our cookie-matching technology locates your top prospects for high conversions.

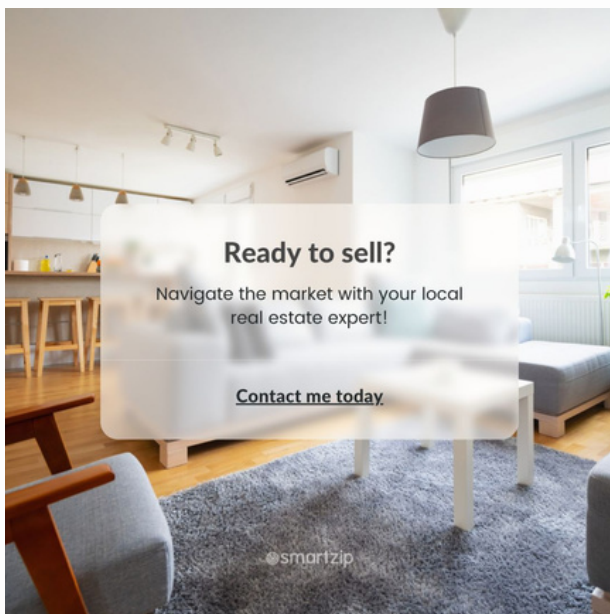
[Click here](#)



## High-Value Offer Postcard

Select from hundreds of rich, pre-designed postcard templates, so you can match your message to your audience

[Click here](#)



[Download Complimentary Social Media Content →](#)



[5 Tips and Tricks for Lead Generation →](#)

# December

**PRO TIP!** Revisit goals from the past 11 months to plan for the year ahead!

## Monthly Goals

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As the year is wrapping up and the holidays are in full swing, take this time to build relationships. Send a email greeting to your connections. Include ideas for giving back to the community, or provide your favorite holiday recipe. Also, send a holiday postcard to your SOI, encourage them to keep you in mind as they plan for the New Year. Most importantly, send a thank you email that requests reviews to strengthen your credibility.

## Observed Holidays:

Hanukkah Begins

Winter Solstice

Christmas Eve

Christmas

Kwanzaa Begins

New Year's Eve

## Upcoming Holidays:

New Year's Day

## Action Items

[Send Holiday Greeting Card to SOI & Farm Area](#)

.....

[Launch Facebook, Instagram & Google Ads](#)

.....

[Send a "Thank you" Email to Previous Clients](#)

.....

[Schedule Social Media Content](#)

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## Reach150 Recommendation

Leverage your contacts to generate email interactions. Select from one of our pre-created templates, or create your own.

[Click here](#)



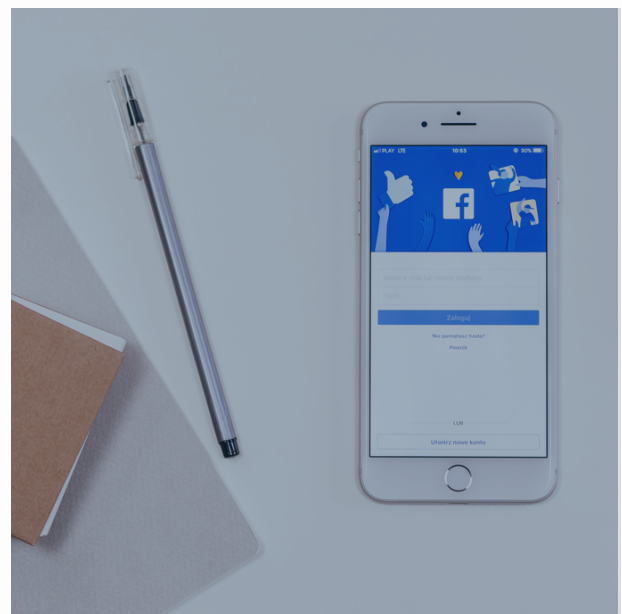
## Handwritten Letters

Select from hundreds of rich, pre-designed postcard templates, so you can match your message to your audience

[Click here](#)



[Download Complimentary Social Media Content →](#)



[How to Seamlessly Turn Testimonials Into Online Ads →](#)

# Some Terms & Definitions

## **CTA: Call-to-Action**

A call-to-action is the next step you want your leads to take towards becoming clients. For example, try adding CTA like "Click the link below for a FREE home appraisal" to a social media post or email campaign!

## **SOI: Sphere of Influence**

This is the network, or farming area, that you have \*influence\* over. We recommend targeting these prospects with high-value marketing campaigns to win them over.

## **PC: Postcard**

Examples of postcards that have been proven successful are: JL/JS (Just Listed/Just Sold), Self-Promo, Handwritten Letters, and High-Value Offers. Rotate through each to ensure you are providing value while building trust with your top prospects.

## **USP: Unique Selling Point**

Your unique selling point is what makes you better than the competition. It is the "why you should work with me and not them" statement. Your USP should be no more than 1 sentence, and clearly define your expertise.

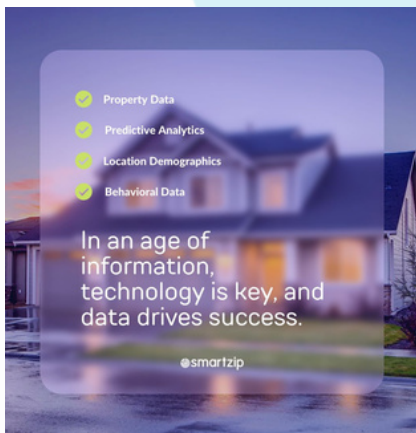
## **SEO: Search Engine Optimization**

This is the process of improving the search rankings of a website to become easily findable, more relevant and popular towards user searches! \*\*This is already done for when you use a SmartZip's landing page and personal referral site.



# Final Thoughts

After the 12-months have passed, set your sights on what is next, and take inventory on what needs to be done to get you there. Focus on re-engaging old leads and launching drip campaigns such as postcards or automated emails to top prospects in your area. And, don't forget to post weekly social media content on your social platforms ([download content here](#))! And, like always, if you need extra hands growing your database you can learn more about our automated marketing and follow-up tools.



## Explore SmartZip Add-Ons

Outline the vision, goals, basic financial plan, specific tactics, and other planning decisions to guide your investments and overall strategy for growth.

[Click here](#)



## Stay Informed & Stay Ahead

Be sure to follow all of the SmartZip social channels as we are dropping weekly, easy-to-implement insights and business growth strategies. See you there!





# 12-Month Marketing Plan