

2025 AGENT MARKETING PLANNER



COLDWELL BANKER | **TOMLINSON**



DEFINE YOUR GOALS

The first step is establishing your goals and vision – not just for the year ahead, but for the rest of your life. It's your “why” that will help you stay focused.

A powerful vision is one that considers all your goals, both personal and professional. What does living an exceptional life mean to you? Think about what you really want to accomplish in life – it might be expanding your business to include loved ones, earning enough to pay off your mortgage, or retiring at age 65 with a solid nest egg. Where would you like to be in 5, 10, 15 years and beyond?

This Agent Marketing Planner is intended to be a workbook – write on it, check action items off and use it to create a solid strategy that will promote your personal brand and listings. Having a plan in place helps to set you on the right path to reach your goals. What would you try to accomplish if success were guaranteed? Think big and go for it. We believe your best years are ahead of you!

2025 PLANNING

HIGHLIGHTS

What were the highlights of 2024? _____

“DO OVERS”

If you could change or re-do 2024, what would you do differently? _____

MAGIC WAND

How would next year be if you had a magic wand that could make it just how you want? _____

MY “WHYS”

What is most important to me in my life?

1. _____

2. _____

3. _____

GOALS FOR 2025 AND BEYOND

What are your goals for 2025? _____

Where do you see your business in three years? _____

SWOT ANALYSIS

Start your marketing plan by analyzing the driving factors in your real estate business and meet with your broker, manager or marketing team to identify Strengths, Weaknesses, Opportunities and Threats (or challenges).

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

2025 ACTION ITEMS

- ☐ If you already have a personal brand, make sure to update your marketing for 2025
- ☐ Ensure your headshot, bio and contact info is up-to-date on social media, website and all other industry sites
- ☐ Update your email signature
- ☐ Refresh the design of your personal website
- ☐ Include the [Move Meter®](#) and [CB Estimate®](#) widgets on your website
- ☐ Update your business card if anything has changed
- ☐ Additional Ideas

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

CONTENT THAT CONVERTS

CREATE CONTENT WITH A PURPOSE

Using one of these four content strategy pillars will ensure you are posting content that provides value to your followers. Your content should provide a healthy mix of these four things:

CONTENT TYPE	GOALS	EXAMPLES
Educational	• Define audience • Convey valuable info • Addresses relevant industry topics • Become a reliable source	• Market updates • Summary of current industry news • Professional Advice
Entertaining	• Evoke emotion • Stop the scroll • Engage with audience	• Stories & Experiences • Trending Audio • Vlogs • Inspiration
Promotional	• Brand Awareness • Inform the audience of the services you provide	• Listing Updates • Testimonials • Featured Properties
Connect	• Develop relationships • Demonstrate your values • Builds connection with others	• Engage with other's content • Reply to comments and messages • Share personal updates

STAY CONNECTED

According to NAR, 85% of people don't know how to get in touch with their agent. Stay in front of your sphere with relevant email campaigns that add value and capture attention!

EMAIL DRIP CAMPAIGNS

Stay in front of your sphere with relevant email campaigns that add value and capture attention.

Annually

- ☐ Schedule a holiday email campaign for all contacts through your CRM
- ☐ Set up topical email drip campaigns for your sphere, such as Home Improvement Tips, Home Security Tips, Design Trends
- ☐ Additional ideas _____

Monthly

- ☐ Setup Monthly Market Report campaign to keep prospects updated on what's happening in the local market
- ☐ Opt-in to send monthly newsletters to clients
- ☐ Additional ideas _____

As the Opportunity Arises

- ☐ Sellers – Set drip campaign such as Selling Opportunity, Home Selling Tips, Cold Seller
- ☐ Buyers – Set drip campaign such as Renter, Buyer Lead, Active Buyer, Cold Buyer
- ☐ Recently Sold – Set drip campaign such as Home Improvement Tips, Buyer Closed
- ☐ New Listings – Send Listing Announcement to your contacts
- ☐ Additional ideas _____

[illegible]



STAY CONNECTED

PRINT MARKETING

While digital marketing is king in today's real estate market, sometimes having something to hold in your hand is important as well. You can order a variety of printed marketing pieces from Xpressdocs to add to your marketing mix, and even include a QR code on select materials to track their success. Many of the following also can be customized in Marketing Center, or with the assistance of the Marketing Team and professionally printed locally.

Which of these do you want to include in your marketing?

- ☐ New business cards
- ☐ Banner or billboard signage
- ☐ [Home Selling Guide Booklet](#)
- ☐ [Home Buying Guide Booklet](#)
- ☐ [Home Selling Guide Brochure](#)
(available in both English and Spanish)
- ☐ [Home Buying Guide Brochure](#)
(available in both English and Spanish)
- ☐ [Name badge](#)
- ☐ [Postcards](#) – Just Listed/Sold, home-anniversary, seasonal, market stats, etc.
- ☐ [Prospecting door hangers](#)
- ☐ Personal brochure
- ☐ Market reports
- ☐ Additional ideas _____

STAY CONNECTED

SOCIAL MEDIA

Annually

- ☐ Update headshot and bio on social media accounts
- ☐ Launch/update your personal YouTube channel, the second largest search engine in the world, to post home tours, market updates and other real estate video content
- ☐ Additional ideas _____

Monthly

- ☐ Schedule [Monthly Marketing Assets](#) posts for the month by accessing the ready-made posts on **The CBT Hub**
- ☐ Update [Facebook header](#) using images available on **The CBT Hub** or **Marketing Center (Desk)**
- ☐ Post Monthly Market Report Snapshot from **The CBT Hub** with commentary about what's happening in the market
- ☐ Additional ideas _____

Weekly

- ☐ Check the posts on our company Facebook page and share posts that will interest your followers
- ☐ Share and provide commentary on current real estate industry news
- ☐ Provide professional real estate advice and tips
- ☐ Share personal stories, experiences, updates and life experiences
- ☐ Engage with other people's content and reply to comments and messages
- ☐ Additional ideas _____

As the Opportunity Arises

- ☐ Post unique features of your newest listing, but be careful not to only post your listings
- ☐ Share client testimonials
- ☐ Run ads that will either promote your listing or yourself
- ☐ Additional ideas _____



STAY CONNECTED

GETTING STARTED ON SOCIAL MEDIA

If you aren't leveraging social media for your business, it's never too late!

- ☐ Do you know which social platforms your contacts are spending the most time on? That's where you should start:

- ☐ Create a profile using the same headshot, bio and contact information that you use on websites
- ☐ Download your chosen social media platform app(s) and make sure you've turned on Notifications in the Settings on your phone, so you will be alerted whenever someone interacts with you
- ☐ Interact and respond when someone comments on your posts
- ☐ Review your feed and watch for life events that might create a need for your services (wedding, birth, moving, etc.)
– congratulate them first, then follow up by offering your support
- ☐ Once you're on social media, send friend requests (Facebook), connect requests (LinkedIn) or follow (Instagram) the people you know. This might include:
 - ☐ Current and past clients and prospects
 - ☐ People you refer to your clients – appraisers, mortgage brokers, insurance agents, contractors, plumbers, landscapers, housekeeping services, lawyers
 - ☐ Parents of your children's friends
 - ☐ Personal connections from your neighborhood, community organizations, volunteer groups, book clubs
 - ☐ Friends from college, high school and places you've lived previously
 - ☐ Family
 - ☐ Acquaintances
 - ☐ Other agents
 - ☐ Coldwell Banker employees
 - ☐ Additional ideas _____

JANUARY

PROSPECTING CALENDAR

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Notes:			1 ☐ Social/Email: Happy New Year	2	3	4 ☐ Social: New Year New Market Trends
5	6	7 ☐ Social: Winter Safety Tips	8	9	10	11
12	13 ☐ Holiday: Make Your Dreams Come True Day	14 ☐ Holiday: Organize Your Home Day	15	16	17 ☐ Social: Now Might Be the Right Time to Sell	18
19	20 ☐ Social: Martin Luther King Jr. Day	21	22	23	24 ☐ Postcard: Groundhog Day (Feb. 2)	25
26	27	28	29 ☐ Social: Lunar New Year (Feb. 2)	30	31	

FEBRUARY

PROSPECTING CALENDAR

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Notes:						1 ☐ Social/Email: Black History Month
2 ☐ Social/Email: Groundhog Day	3	4	5	6	7 ☐ Social: Home Date Night Ideas	8
9	10 ☐ Social: Valentine's Day Home Tours	11	12	13	14 ☐ Social/Email: Valentine's Day	15
16	17 ☐ Social/Email: President's Day ☐ Social: Random Acts of Kindness Day	18	19 ☐ Social/Email: Energy Saving Tips	20 ☐ Social: Love Your Pet Day	21	22
23	24	25 ☐ Social: Spring Market Preview	26	27	28 ☐ Social: Ramadan	

MARCH

PROSPECTING CALENDAR

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Notes:						1 ☐ Social/Email: Women's History Month ☐ Postcard: St. Patrick's Day
2 ☐ Social: National Read a Book Day	3	4	5	6	7	8 ☐ Social: International Women's Day ☐ Social/Email: Daylight Savings Time (March 9)
9	10	11 ☐ Social: Home Organization Tips	12	13	14	15 ☐ Postcard: Tax Tips
16	17 ☐ Social/Email: St. Patrick's Day	18	19	20 ☐ Social/Email: First Day of Spring	21	22
23	24	25 ☐ Social: Seasonal Home Maintenance Tips	26	27	28	29 ☐ Social: Eid al-Fitr
30	31 ☐ Social: Neighborhood Spotlight					

APRIL

PROSPECTING CALENDAR

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1 ☐ Social/Email: Fair Housing Month	2 ☐ Social: World Autism Awareness Day	3 ☐ Social/Email: Arab American Heritage Month	4	5
6 ☐ Postcard: Earth Day (April 22)	7	8	9	10 ☐ Social: Eco-Friendly Homes	11	12 ☐ Social: Passover
13	14 ☐ Social: Home Buying Myths Debunked	15	16	17	18 ☐ Social: Home Design Trends	19
20 ☐ Social/Email: Easter ☐ Social: Volunteer Recognition Day	21	22 ☐ Social: Earth Day	23 ☐ Social: Admin Professionals Day	24 ☐ Social: Take Our Daughters and Sons to Work Day	25	26
27	28	29 ☐ Postcard: Mother's Day (May 11)	30	Notes:		

MAY

PROSPECTING CALENDAR

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Notes:				1 ☐ Email/Social: Asian-Pacific American Heritage Month	2 ☐ Email/Social: National Military Appreciation Month	3 ☐ Email/Social: Jewish American Heritage Month
4	5 ☐ Social: Cinco de Mayo	6 ☐ Social: National Nurses Day	7 ☐ Social: Teacher's Appreciation Day	8	9	10
11 ☐ Social: Mother's Day	12	13 ☐ Postcard: Memorial Day (May 26)	14	15	16	17
18	19	20 ☐ Social: Home Moving Tips	21	22	23 ☐ Social: Graduation Season	24
25	26 ☐ Social: Memorial Day	27	28	29 ☐ Social: Garden Inspiration	30	31

JUNE

PROSPECTING CALENDAR

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1 ☐ Social/Email: National Homeownership Month ☐ Social/Email: Pride Month	2	3 ☐ Postcard: Father's Day (June 15)	4	5	6 ☐ Social: Eid al-Adha	7
8	9 ☐ Social Local Summer Events	10	11	12	13	14 ☐ Social Flag Day
15 ☐ Social/Email: Father's Day	16	17	18	19 ☐ Social/Email: Juneteenth	20 ☐ Social/Email: First Day of Summer	21
22	23 ☐ Social Summer Market Update	24	25	26	27 ☐ Postcard: 4 th of July (July 4)	28
29	30	Notes:				

JULY

PROSPECTING CALENDAR

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Notes:		1	2	3	4 ☐ Social: Fourth of July	5
6	7 ☐ Social: First Time Homebuyer Tips	8	9	10	11	13
11	14	15 ☐ Social: National Pet Fire Safety Day	16	17	18 ☐ Email: Home Improvement Tips - Home Decor	19
20 ☐ Social: National Ice Cream Day	21	22	23	24 ☐ Social: Energy Saving Tips	25	26
27	28	29	30	31 ☐ Social: Back to School		

AUGUST

PROSPECTING CALENDAR

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Notes:					1 ☐ Email: Local Farmer's Markets	2
3	4 ☐ Social/Email: Coast Guard Birthday	5	6	7 ☐ Postcard: Football Schedules	8	9
10	11	12	13 ☐ Social/Email: Home Improvement Tip - Curb Appeal	14	15	16
17	18	19	20	21	22 ☐ Social: Fall Market Preview	23
24	25	26 ☐ Social: National Dog Day	27 ☐ Key Date Coldwell Banker Birthday	28	29	30
31						

SEPTEMBER

PROSPECTING CALENDAR

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1 ☐ Social/Email: Realtor Safety Month ☐ Social: Labor Day	2	3	4	5	6
7 ☐ Social: Grandparents' Day	8	9	10	11 ☐ Social/Email: Patriot Day	12	13
14	15 ☐ Social/Email: National Hispanic Heritage Month (Sep 15 th -Oct 15 th)	16	17	18 ☐ Social: Air Force Birthday	19	20
21	22 ☐ Social: First Day of Fall	23	24	25	26 ☐ Social: Client Success Stories	27
28	29 ☐ Social: National Coffee Day	30	Notes:			

OCTOBER

PROSPECTING CALENDAR

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Notes:			1 ☐ Social/Email: National Disability Employment Awareness Month ☐ Social/Email: LGBTQ+ History Month ☐ Social: Yom Kippur	2 ☐ Social: Rosh Hashanah	3	4
5	6	7 ☐ Social/Email: Fall Home Maintenance Tips	8	9	10 ☐ Postcard: Halloween (October 31)	11
12	13 ☐ Social: Navy Birthday	14	15	16 ☐ Social: Boss Day	17	18
19	20	21 ☐ Social: Fall Curb Appeal	22	23	24	25
26	27 ☐ Postcard: Veterans Day (November 11)	28	29	30	31 ☐ Social: Halloween	

NOVEMBER

PROSPECTING CALENDAR

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Notes:						1 ☐ Social/Email: Native American Heritage Month ☐ Social: Dia de los Muertos
2 ☐ Social/Email: Daylight Savings	3	4	5	6 ☐ Social: Home Winterization Tips	7	8
9	10 ☐ Social: Marine Corps Birthday	11 ☐ Social: Veterans Day	12	13	14	15 ☐ Postcard: Small Business Saturday (November 29)
16	17	18	19 ☐ Postcard: Happy Holidays	20	21	22
23	24 ☐ Social: Holiday Home Safety Tips	25	26	27 ☐ Email/Social: Thanksgiving	28	29 ☐ Social: Small Business Saturday
30						

DECEMBER

PROSPECTING CALENDAR

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1	2 ☐ Social: Giving Tuesday	3 ☐ Social: International Day of Persons with Disabilities	4	5	6
7 ☐ Postcard: First Day of Winter (December 21)	8	9	10	11	12	13 ☐ Social: National Guard Birthday
14 ☐ Social: Hanukkah	15	16 ☐ Social: Family Portrait/ Christmas Post	17	18	19	20
21 ☐ Social/Email: First Day of Winter	22	23	24	25 ☐ Social: Christmas	26 ☐ Social: Kwanzaa	27
28	29 ☐ Social/Email: A Year In Review	30	31 ☐ Social: New Year's Eve	Notes:		

EDUCATION

WIN THE LISTING. PROVE YOUR VALUE. TURN ONE LISTING INTO THREE.

Take full advantage of the opportunities available to you to continually build your skills and become more effective in running your business successfully.

Polish Your Skills

Your sales skills and marketing can help you get your foot in the door – then you need to be prepared to talk your way to closing the deal. Visit [CBU.com](https://www.cbu.com) for a schedule of **BootcAMP**, which is designed to help you get business now and includes lead generation best practices, developing scripts and practice calls. Benefit from our **Outlist | Outlast** and Buyer Strategies courses, with in-class and self-paced activities, live demos and skill-building activities that can help you hone the essential tools for success. For qualified agents, unlock the power of the Coldwell Banker Global Luxury® program by becoming a certified [Global Luxury Property Specialist](#). Visit Desk and search “CBGL certification” to learn more.

Boost Your Business

Affiliated agents who took CBU Learning Center courses displayed greater improvement in their business during the 12 months following their coursework than in the 12 months prior. The average improvement over the prior 12-month period was 33% for closed volume and 11% for closed units.

Practice Your Pitch

Always know what to say to a prospect or client by practicing with the scripts in the agent scripts library provided in the CBU Learning Center.

Keep Learning

Ongoing education is vital for real estate agents, so you can stay on top of trends and tools and sharpen your skills. A robust educational program, including online, on-demand and instructor-led live classes, is available to you as part of **Coaching to Confidence**. For a deeper dive into these topics and more, including the course catalogs and Agent Pathways, visit [CBU.com](https://www.cbu.com).

What skills do you need to improve upon this year?

- | | |
|--|---|
| ☐ Business planning | ☐ Negotiating |
| ☐ Generating leads | ☐ Prospecting |
| ☐ Listing presentations | ☐ Additional ideas _____ |
| ☐ Marketing | |

NETWORKING

Get Out There

- ☐ Both virtual and face-to-face meetings are effective ways to convert a prospect into a client. Be sure your plan includes opportunities to make that happen.
- ☐ Attend at least one networking event each month, proudly wearing your name tag or a Coldwell Banker® logo shirt.
- ☐ Get involved with local charities or organizations that support causes you believe in. It's a rewarding way to establish strong connections while making a difference in your community.
- ☐ Learn how to use MoxiPresent® to show prospects what their home may be worth. Then keep your tablet with you so you're ready when it comes up in conversation.

Benefit From Referrals

Referral Rewards is a powerful **Wealth Builder** program that helps you generate a passive commission stream by introducing other successful agents to a career with Coldwell Banker.

Leverage Word of Mouth

While your direct contacts might not currently be in the market to buy or sell a home, they may know someone who is, so remember to always ask your clients for referrals.

Grow Your Business

Agents participating in the [CB Supports St. Jude](#) program make an automatic donation for every home sale or purchase they complete. Your participation in the **CB Supports St. Jude** program not only increases awareness of this important cause, but also allows you to associate yourself with a world-renowned organization to help attract new sellers and buyers who are connected to St. Jude.

Additional Ideas: _____



GLOSSARY

Boost – Automates real estate digital advertising campaigns for listings, open houses and more on Facebook, Instagram, Wave and across the web.

CBU Learning Center – Find robust education programs for all levels of experience built on best practices from top performers within the Coldwell Banker® network, including instructor-led and self-study courses designed to help you grow your business.

Marketing Center – Save time and easily create beautiful marketing materials in minutes. Automate your marketing and stylishly promote yourself and your listings with customizable videos, social assets and print integration.

MoxiPresent – This listing presentation and comparative market analysis (CMA) tool helps you create sleek, professional presentations integrated with your MLS to provide accurate and up-to-date market data.

The CBT Hub – The Coldwell Banker Tomlinson created and maintained internal resources website. By visiting thecbthub.com, agents and staff have access to all things created by Coldwell Banker Tomlinson, ranging from marketing resources and brand assets to company event calendars office forms and more.

Xpressdocs – Order printed marketing materials, business cards, direct mail, property brochures and more.

QUESTIONS?

Connect with your broker or manager to discuss your marketing plans.

REFLECTION

January Goals: _____

Successes _____	Failures _____	How to Improve _____
_____	_____	_____
_____	_____	_____

February Goals: _____

Successes _____	Failures _____	How to Improve _____
_____	_____	_____
_____	_____	_____

March Goals: _____

Successes _____	Failures _____	How to Improve _____
_____	_____	_____
_____	_____	_____

April Goals: _____

Successes _____	Failures _____	How to Improve _____
_____	_____	_____
_____	_____	_____

May Goals: _____

Successes _____	Failures _____	How to Improve _____
_____	_____	_____
_____	_____	_____

June Goals: _____

Successes _____	Failures _____	How to Improve _____
_____	_____	_____
_____	_____	_____

REFLECTION

July Goals: _____

Successes _____	Failures _____	How to Improve _____
_____	_____	_____
_____	_____	_____

August Goals: _____

Successes _____	Failures _____	How to Improve _____
_____	_____	_____
_____	_____	_____

September Goals: _____

Successes _____	Failures _____	How to Improve _____
_____	_____	_____
_____	_____	_____

October Goals: _____

Successes _____	Failures _____	How to Improve _____
_____	_____	_____
_____	_____	_____

November Goals: _____

Successes _____	Failures _____	How to Improve _____
_____	_____	_____
_____	_____	_____

December Goals: _____

Successes _____	Failures _____	How to Improve _____
_____	_____	_____
_____	_____	_____



COLDWELL BANKER

TOMLINSON



©Coldwell Banker Real Estate LLC. All Rights Reserved. Coldwell Banker® and the Coldwell Banker Logo are registered service marks owned by Coldwell Banker Real Estate LLC. Coldwell Banker Real Estate LLC fully supports the principles of the Fair Housing Act and the Equal Opportunity Act. Each office is independently owned and operated. Not intended as a solicitation if your property is already listed by another broker.