

Agent Marketing Playbook

2026



COLDWELL BANKER
TOMLINSON





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A LETTER FROM LEADERSHIP

At Coldwell Banker Tomlinson, we believe that true success doesn't happen by chance—it's built through purpose, persistence, and partnership. Every day, our agents set out to serve clients with integrity and excellence, and our role as a company is to ensure you have the tools, guidance, and support to do just that.

The Agent Marketing Playbook was designed with you in mind—to help you create a focused, effective marketing strategy that aligns with your personal goals and reflects the strength of both the Coldwell Banker brand and our Tomlinson Family of Companies. Within these pages, you'll find practical tools, marketing resources, and proven strategies to help you grow your business, elevate your personal

brand, and connect meaningfully with your clients and communities.

At Coldwell Banker Tomlinson, we're proud of our legacy of leadership and innovation across the Northwest. We've built a culture where collaboration fuels growth and where every agent has the opportunity to thrive. This Playbook is more than just a guide—it's a living resource that will evolve alongside your business throughout 2026 and beyond.

We're excited to see how you'll put these tools into action and continue to raise the standard of excellence that defines Tomlinson. Here's to your success in the year ahead!

Bob Van Allen
President
Coldwell Banker Tomlinson



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Visualize

Identify Your Goals

Clarify the kind of business you want to build and the impact you want to make, so every marketing move reflects your bigger vision.

SWOT Analysis

Perform a SWOT analysis to identify your strengths and weaknesses, and to assess opportunities and threats within your business, your market, and the industry.

From Vision to Action

Your business and goals can fluctuate as the seasons change, so track your progress with regular check-ins and make adjustments along the way.

The first step on the path to goal setting is pinpointing your vision for what you hope to achieve. Not just for the year ahead, but for the rest of your life. It’s your “why” that will help you stay focused. This chapter can help you through the process of defining your growth goals, evaluating your unique strengths, and identifying your top priorities of where to focus your efforts to produce the best results.

Identifying Your Goals

Before you can build a powerful marketing strategy, you need a clear vision of what you’re working toward. That’s why the first and most important step in this Playbook is to define your goals for 2026.

Your goals are your roadmap. They give your efforts direction, help you measure progress, and keep you focused on what matters most. Whether you're aiming to increase your transaction volume, grow your GCI, expand into a new market, or build a stronger personal brand, the key is to make your goals:

- **Clear** – Know exactly what you want to achieve.
- **Tangible** – Use numbers, milestones, or specific outcomes.
- **Achievable** – Set goals that challenge you, but are realistic with the right plan & support.

Take a moment to reflect on what success looks like for you in 2026. What do you want your business to look like a year from now?

Write it down. Be specific. This is your vision, and it’s the foundation for everything that follows in this Playbook. Let’s get started.

2026 Goals

SWOT Analysis

Start your marketing plan by analyzing the driving factors in your real estate business and meet with your broker or marketing team to identify:

- **Strengths** – Coldwell Banker Tomlinson brand recognition, experience, reputation in the market, certifications and skills you’ve achieved
- **Weaknesses** – Underdeveloped media presence, unfocused marketing plan
- **Opportunities** – Untapped resources designed to support your business, potential partnerships, coaching and education
- **Threats** – Social competition, market fluctuations or anything else that may pose a risk to your success

You can use the results of your SWOT Analysis to help create your value proposition and messaging when prospecting.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

From Vision to Action

Your business can fluctuate as the seasons change, and so too can your goals, marketing investments, and your strategy overall. Break the year down into quarters so you can map out your plans and arrange regular check-ins to track your progress and make adjustments along the way as needed. Noting your top priorities and lead sources can also help you focus your efforts on the areas that can produce the best results.

TOP PRIORITIES

What things can help move my business forward?

TOP LEAD SOURCES

Where did my business come from last year?

Q1

Marketing Goals

Budget

Target Audience

Q2

Marketing Goals

Budget

Target Audience

Q3

Marketing Goals

Budget

Target Audience

Q4

Marketing Goals

Budget

Target Audience



Establish

Create a Strong Presence

Start the year with high-impact moves that establish credibility, attract attention and position you as the market authority.

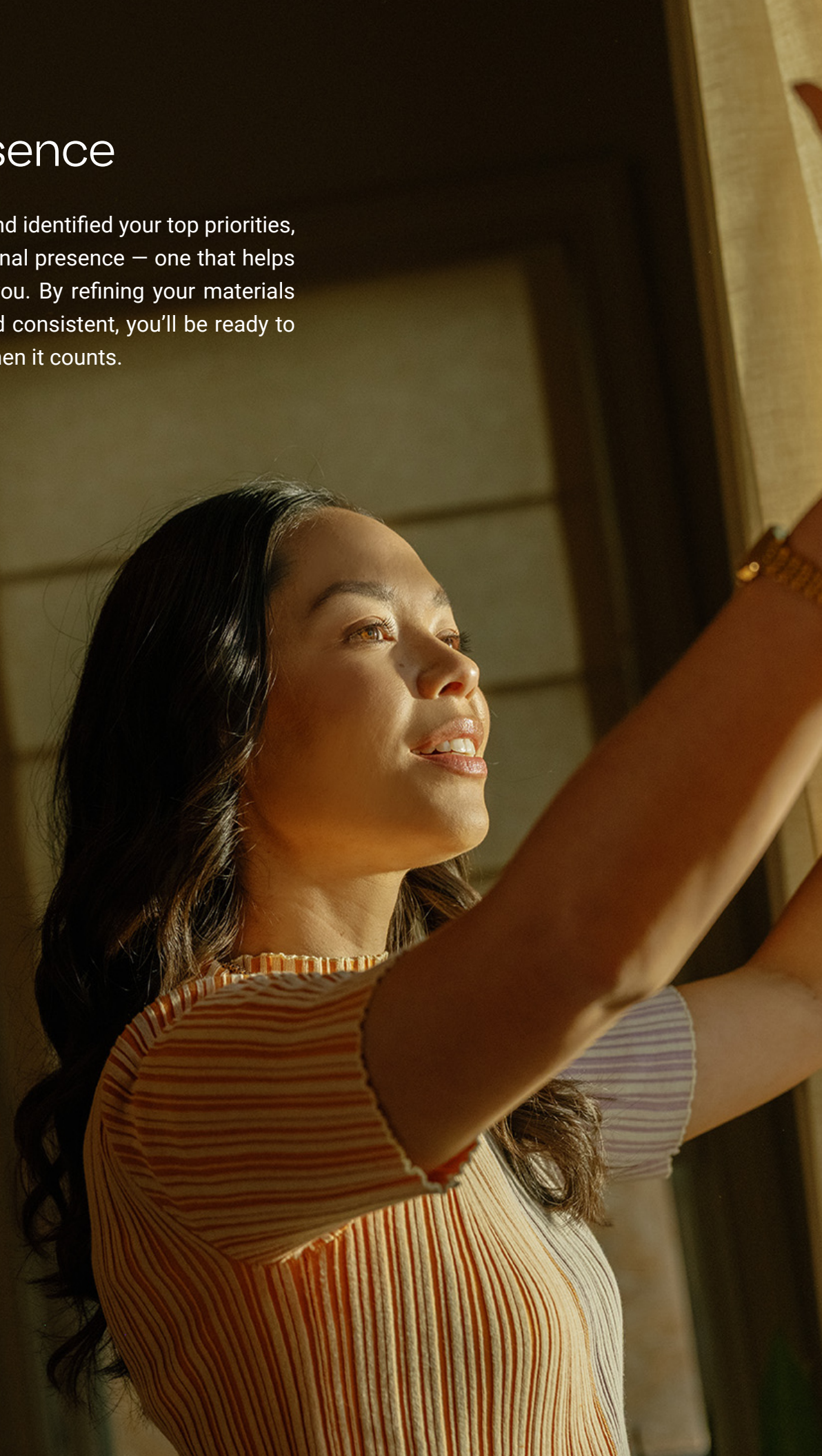
Make an Impact

Print marketing materials remain a powerful way you can stand out and make a lasting impression by promoting yourself and your listings with confidence.

Now that you've set your goals and have taken steps to identify actionable opportunities, it's time to build a solid foundation for your business – so clients can find you, trust you and remember you. Having all your relevant materials polished and ready to go can help make a lasting impression when it's time to launch.

Create a Strong Presence

Now that you've set your vision and goals and identified your top priorities, it's time to focus on building a strong personal presence — one that helps clients find you, trust you, and remember you. By refining your materials and making sure your brand is polished and consistent, you'll be ready to make a lasting impression and stand out when it counts.



OWN THE SPOTLIGHT

Start the year with high-impact moves that establish credibility, attract attention and position you as the market authority:

- ☐ **Refresh your professional presence:** Update your headshot, bio, email signature and business cards.
- ☐ **Elevate your presence:** Create a premium and consistent look across all your marketing platforms.
- ☐ **Supercharge your website:** Add Move Meter® and CB Estimate widgets to spark client curiosity and engagement.
- ☐ **Perfect your property marketing plan:** Showcase listings with consistency and polish every time.
- ☐ **Launch an email campaign:** Deliver relevant, valuable content to your sphere all year long.
- ☐ **Plan your social strategy:** Map out paid and organic campaigns that highlight your expertise and market insights.

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.
- ☐ Launch/update a YouTube channel, the world's second largest search engine, to post home tours, market updates and other real estate video content.

Make an Impact

Print marketing materials remain a powerful way you can stand out and make a lasting impression. From eye-catching property flyers and elegant brochures to branded postcards, door hangers and business cards, you can order a variety of printed marketing pieces to add to your marketing mix.

CONSIDER ADDING SOME OF THESE TO YOUR MARKETING:

- ☐ New business cards
- ☐ Buyer/Seller Guide Booklet and Brochure
- ☐ Name badge
- ☐ CB Estimate® & Move Meter® materials
- ☐ Banner signage
- ☐ Prospecting postcards, door hangers
- ☐ Customized personal print marketing
- ☐ Postcards - Just listed/sold, housiversary, seasonal, etc.

☐ Additional ideas:

PREMIUM CANVA BENEFITS

In 2026, the Coldwell Banker brand is partnering with Canva, bringing you professionally branded templates that make marketing feel effortless. Wherever you are in your business, this tool is designed to help you save time and promote yourself and your listings with confidence.

- Easy customization of branded templates: Access templates for multiple asset types created in partnership with the Coldwell Banker brand, with seamless access to logos, photos and data to simplify content creation.
- Powerful design capabilities made easy: Elevate your brand presence with polished, high-quality materials in minutes.
- Smooth transition for existing Canva Pro users: If you're already using Canva, you can seamlessly migrate to Canva Enterprise without losing any content.

Nurture

Stay Connected on Social

Build trust and visibility by sharing updates, insights, and stories that keep you top of mind year-round with your audience.

Up Your Email Game

Elevate your inbox presence with polished, purposeful and personal messages that keep clients engaged and eager to connect.

Drive Engagement

Make your online presence unforgettable by personalizing your website and using video tools to showcase your personality, build trust, and turn casual visitors into lasting clients.



With your unique value proposition and your supporting materials all in order, it's time to start strengthening relationships with your sphere. By showing up consistently and authentically, you can stay top of mind with your sphere while adding value and capturing attention – trust is built over time, not overnight.

Stay Connected on Social

LEVERAGE YOUR SPHERE

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
- ☐ Personal connections from your neighborhood, community organizations, volunteer groups, book clubs
- ☐ Friends from college, high school and places you’ve lived previously
- ☐ Industry contacts, including agents you’ve worked with, Coldwell Banker Tomlinson employees and other affiliated agents
- ☐ Additional ideas:

QUICK-START GUIDE

- ☐ Interact and respond when someone comments on your posts.
- ☐ Use your favorite AI tool to generate content ideas and attention-getting captions.
- ☐ 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.
- ☐ Reference and make use of the Sample Prospecting Calendar.
- ☐ Share local updates and market stats your clients actually want.

MONTHLY

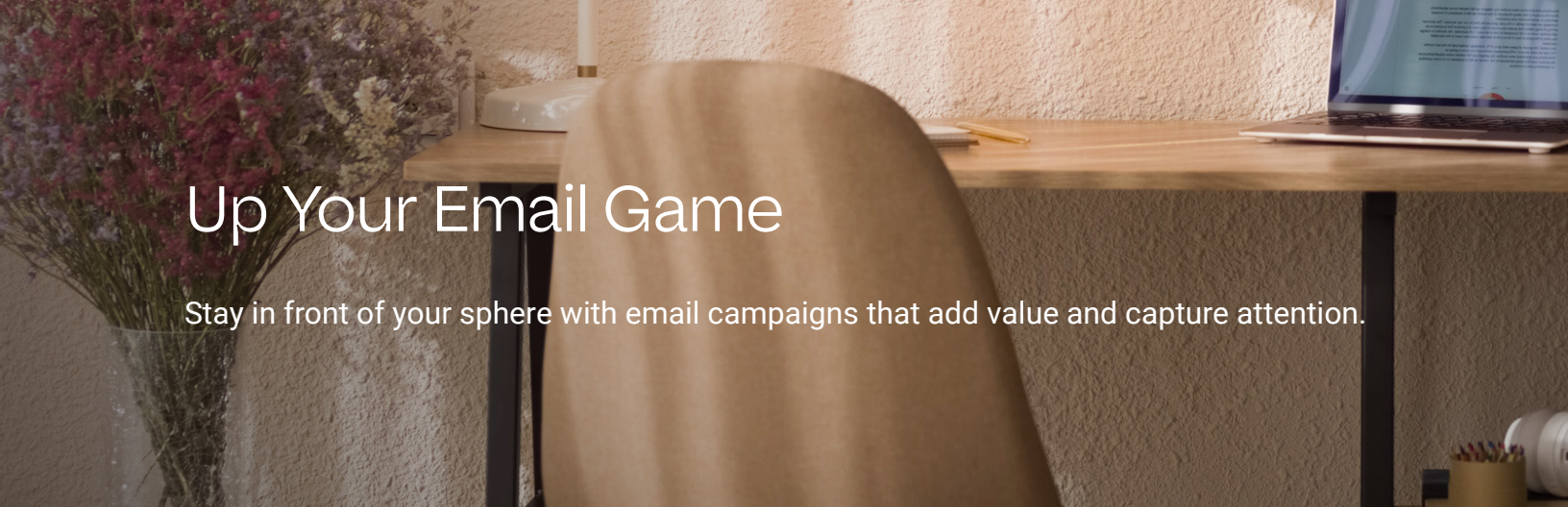
- ☐ Schedule Monthly Marketing Assets posts for the month by accessing the ready-made posts on **The CBT Hub**.
- ☐ Update Facebook header using images available on **The CBT Hub** or **Marketing Center** (Desk).
- ☐ Post Monthly Market Report Snapshot from **The CBT Hub** with commentary about what’s happening in the market.
- ☐ Post listing promotions as the opportunity arises.
- ☐ Share client testimonials.
- ☐ Additional ideas:

WEEKLY

- ☐ Check the posts on our company Facebook page that are relevant to share.
- ☐ 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:

BOOST

With Boost, you can automate your digital advertising campaigns so promotion of you and your listings can be created in just minutes. Visit **Desk > Boost** to create a campaign that will run on Facebook, Instagram, the Nextdoor app and over 1,000 websites.



Up Your Email Game

Stay in front of your sphere with 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, etc.

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

AS THE OPPORTUNITY ARISES

- ☐ Sellers: Set drip campaigns 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:

Drive Engagement

ELEVATE YOUR ONLINE PRESENCE

Our CRM offers dozens of customizable, branded webpage templates to help you personalize your website and showcase your value online.

TWO POWERFUL TOOLS FOR YOUR WEBSITE

- **Move Meter** – Consumers can compare locations based on living affordability, average home prices, and other important factors, helping them make informed decisions on a move that’s right for them.
- **CB Estimate** – Prospective sellers can receive an instant valuation on their home.

You can add both of these tools to your personal website to help drive traffic and generate leads. The Move Meter and CB Estimate widgets are available in your CRM. You can find instructions on how to add these to your website on **The CBT Hub** by finding the Move Meter and CB Estimate Pages.

TURNKEY VIDEO CONTENT

The Coldwell Banker® Custom Video platform helps you produce high-quality video content with your local branding in minutes without any additional cost. From customizing the brand’s national campaigns to making engaging videos that highlight your listings and local market expertise, Custom Video helps you connect with clients in a meaningful, dynamic way that sets you apart in a competitive market.



Amplify

Cultivating Connections

Strengthen your network through genuine relationships by attending events, collaborating with peers, and getting involved with community organizations to help build long-term business growth.

Fuel Your Growth

Invest in yourself by taking advantage of ongoing learning and professional development opportunities to elevate your skills and grow your business.

So far, we've covered strategies and tactics for making that initial connection with your potential clients. Now it's time to amplify your reach and make your business impossible to ignore. By leveraging educational opportunities and local partnerships to expand your reach, you can elevate your business and set yourself apart from the competition.

Cultivating Connections

Building relationships in the industry and throughout the communities you serve is a great way to generate referrals and leads. Make a point to attend brand, industry and community events to get your name out there and make valuable connections. Getting involved local charities can also be a fun and rewarding way to establish strong connections while making a difference in your community.

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 Tomlinson 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.

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.

Fuel Your Growth

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** for a schedule of **AMP!** courses, designed to help you get business now and which also includes lead generation best practices, suggested scripts and practice calls.

Benefit from our courses, with in-class and self-paced activities, live demos and skill-building designed to support your development and strengthen your professional growth. Unlock the power of the Coldwell Banker Global Luxury program by becoming a certified **Global Luxury Property Specialist**.

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 at Coldwell Banker University. Visit **CBU.com** to review our course catalog and Agent Pathways.

Here, explore a variety of enriching classes designed to expand your knowledge and elevate your skills. Whether you're interested in diving deep into a specific topic or enrolling in structured, in-depth courses, you'll find offerings that cover valuable areas.

BOOST YOUR BUSINESS

What skills do you want to improve upon this year?

- | | |
|--|--------------------------------------|
| ☐ Business planning | ☐ Marketing |
| ☐ Generating leads | ☐ Negotiating |
| ☐ Listing presentations | ☐ Prospecting |
| ☐ Additional Ideas: | |

CHAPTER 5

Sample Prospecting Calendar

The following prospecting calendar maps out a recruiting strategy that covers social posts, email drip campaigns, and additional follow-up measures over a 12-month period. The pieces featured in any given month are suggestions; you can modify this schedule as needed to best meet your needs.

CHAPTER 5 HIGHLIGHTS

Schedule Ahead

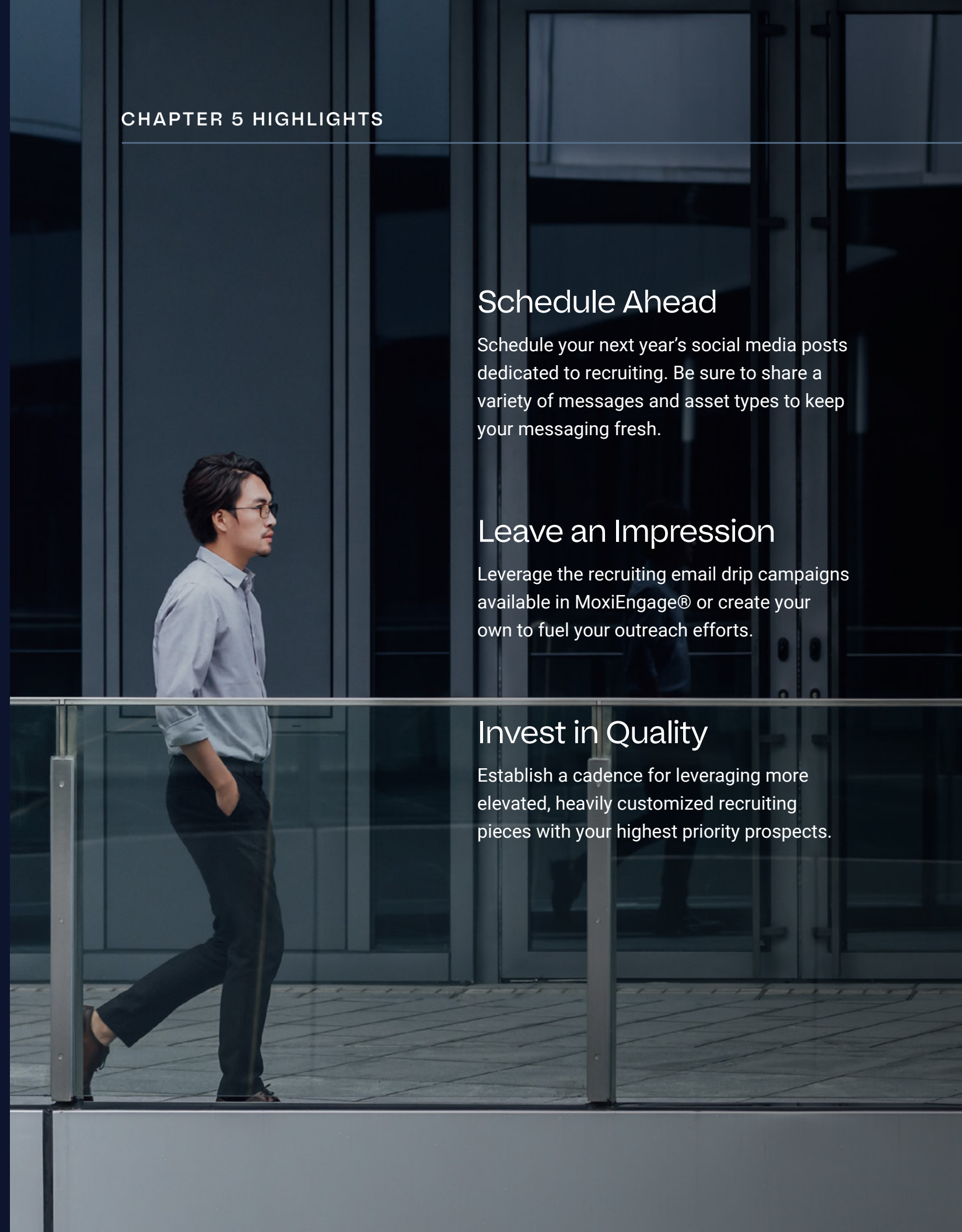
Schedule your next year's social media posts dedicated to recruiting. Be sure to share a variety of messages and asset types to keep your messaging fresh.

Leave an Impression

Leverage the recruiting email drip campaigns available in MoxiEngage® or create your own to fuel your outreach efforts.

Invest in Quality

Establish a cadence for leveraging more elevated, heavily customized recruiting pieces with your highest priority prospects.



Sample Prospecting Calendar

Explore The CBT Hub, your CRM, Desk and Custom Video, to find a variety of email campaigns, social assets, videos, and other custom pieces to support your marketing efforts all year round.

JANUARY

EMAIL/SOCIAL

- Make a reel of touring one neighborhood in your area and talking about features, location, style of homes

PRINT

- Drop off a pop-by to 15 clients (view our pop-by library on The CBT Hub)

HOLIDAY CHECK-INS

- New Year’s Day, Organize Your Home Day, Martin Luther King Jr. Day

FEBRUARY

EMAIL/SOCIAL

- Email to your sphere asking them if they need a CMA

PRINT

- Write a handwritten note to 5 clients

HOLIDAY CHECK-INS

- Black History Month, Groundhog Day, Valentine’s Day, Presidents Day, Ramadan, Mardi Gras

JULY

EMAIL/SOCIAL

- Send a neighborhood watch/neighborhood news to 10-15 clients and follow up with a phone call

PRINT

- Drop off a pop-by to 15 clients (view our pop-by library on The CBT Hub)

HOLIDAY CHECK-INS

- Independence Day

AUGUST

EMAIL/SOCIAL

- CB Estimate social post

PRINT

- Postcard with summer patio ideas to a targeted location (view postcards templates on The CBT Hub)

HOLIDAY CHECK-INS

- Coast Guard Birthday, Coldwell Banker Birthday

MARCH

EMAIL/SOCIAL

- Schedule Live Well With Coldwell posts (available on The CBT Hub)

PRINT

- Postcard for spring buyers and sellers to a targeted location (view postcard templates on The CBT Hub)

HOLIDAY CHECK-INS

- Women’s History Month, Daylight Savings, International Women’s Day, St. Patrick’s Day, Nowruz, Eid al-Fitr, First Day of Spring

APRIL

EMAIL/SOCIAL

- Post Coldwell Banker Quotable and Stats for 2025

PRINT

- Drop off a pop-by to 15 clients (view our pop-by library on The CBT Hub)

HOLIDAY CHECK-INS

- Arab American Heritage Month, Fair Housing Month, Passover, Autism Acceptance Day, Easter, Tax Day, Administrative Professionals Day, Earth Day

SEPTEMBER

EMAIL/SOCIAL

- Run an agent promotion or listing promotion ad in Boost (available on Desk)

PRINT

- Print 10-15 copies of the monthly market report and drop off to clients

HOLIDAY CHECK-INS

- Labor Day, Hispanic Heritage Month, Rosh Hashanah, Patriot Day, Grandparents Day, Air Force Birthday, Yom Kippur, First Day of Fall

OCTOBER

EMAIL/SOCIAL

- Email a favorite recipe to clients

PRINT

- Drop off a pop-by to 15 clients (view our pop-by library on The CBT Hub)

HOLIDAY CHECK-INS

- Boss’s Day, Navy’s Birthday, Halloween

MAY

EMAIL/SOCIAL

- Run an agent promotion or listing promotion ad in Boost (available on Desk)

PRINT

- Write a handwritten note to 5 clients with a coffee gift card inside

HOLIDAY CHECK-INS

- Asian American, Native Hawaiian & Pacific Islander Heritage Month, Military Appreciation Month, Cinco De Mayo, Mother’s Day, Memorial Day, National Real Estate Day

JUNE

EMAIL/SOCIAL

- Move Meter social posts (from Coldwell Banker)

PRINT

- Postcard with summer patio ideas to a targeted location (view postcards templates on The CBT Hub)

HOLIDAY CHECK-INS

- National Homeownership Month, Pride Month, Army Birthday, Flag Day, Juneteenth, Father’s Day, First Day of Summer

NOVEMBER

EMAIL/SOCIAL

- Email seasonal home maintenance

PRINT

- Send holiday cards to clients (view templates on Xpressdocs)

HOLIDAY CHECK-INS

- Native American Heritage Month, Dia de los Muertos, Diwali, Marine Corps Birthday, Veteran’s Day, Thanksgiving, Daylight Savings

DECEMBER

EMAIL/SOCIAL

- End of year wrap up social post with year highlights

PRINT

- Send quarterly market snapshot or From Your Friends postcard

HOLIDAY CHECK-INS

- International Day of Persons with Disabilities, National Guard Birthday, Hanukkah, First Day of Winter, Christmas, Kwanzaa, New Year’s Eve

Evaluate

Now that you’ve executed your marketing strategies, take a step back to evaluate your efforts, celebrate successes, and identify areas for improvement. Just as important as planning and execution are tracking and analyzing your results. Doing so will help you make informed decisions to maximize ROI.

Marketing Summary

Reflect on what worked and where you can improve by reviewing your successes, learning from challenges, and setting clear goals for the next phase.

Notes

Use this space to capture ideas, reminders, and insights as you work through your marketing plan.

My 2026 Marketing Summary

Reflect on your progress and set your sights on what’s next to achieve.

GOALS I MET

Your celebrated wins – big or small – that made this year count.

MONTHLY OUTREACH CADENCE

How often you connected with your sphere and in what ways.

WHAT’S WORKING

The tools and strategies that moved your business forward.

CONTENT THAT RESONATED

The topics and types of content that got the most engagement.

Notes



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