

# ☰ WINTER REAL ESTATE BUSINESS CHECKLIST

*Grow your real estate business by preparing for winter with this easy-to-follow checklist.*

## **Create and set clear goals for the upcoming year.**

- ☐ Determine your revenue goal
- ☐ How many listings or closings do you need for the revenue goal
- ☐ How many team members to keep, remove, or add
- ☐ How much will you set aside for your monthly/annual marketing budget
- ☐ How many new clients do you want to add to your email or mail database
- ☐ How many new people do you want to add to your business network

## **Select the type of marketing to use this year.**

- ☐ Social media posts
- ☐ Individual note cards for select clients
- ☐ Individual gifts for your favorite clients
- ☐ Review and update your website if needed
- ☐ Automate direct mail campaigns to specific farms
- ☐ Send/Drop off market reports for select clients annually
- ☐ Seasonal newsletter campaigns for print or email delivery
- ☐ Email drip campaigns for your existing clients and growing network

## **Complete general business maintenance for this year.**

- ☐ Register for networking events
- ☐ Update your overall business plan
- ☐ Update marketing budget and plan
- ☐ Review or renew business insurance
- ☐ Review and refresh business cards if needed
- ☐ Prepare business receipts and information for CPA
- ☐ Schedule to attend business-related social activities
- ☐ Evaluate the progress of your current marketing strategy
- ☐ Review team member changes and their unique skill sets
- ☐ Renew or discontinue club and organization memberships based on benefits
- ☐ Review all outgoing expenses to determine their value for retention or removal

