



marketing

|||||

action plan

introduction

welcome!

Thank you for downloading the Marketing Action Plan

by BreakthroughBroker.com! Before you get started, we thought we'd give a brief overview of what's to come. With the explosive popularity of social media outlets, marketing has never been more vital to your success nor has it ever been as overwhelming. Consumers are flooded with ads on a daily basis, and separating yourself from your competitors has become more difficult.

So how do you make yourself stand out from the herd? This guide will help you define your brand and pinpoint your key messages and value proposition to help lead your marketing efforts. It will also help you budget your efforts and determine which marketing sources work and which should be tossed.

Marketing your brand can be huge undertaking, but it does not have to be crushing. Take your time working through this plan, and you're sure to have a successful year!

Now let's get started!

Short-Term Goals and Actions

The first step in any successful marketing plan is to set goals. How will you be able to shape your plan if you don't know what you're working towards? Goals help you measure your marketing efforts and make sure you stay on the right track.

Action begets action, so let's begin by setting some short-term goals. Consider a marketing medium you want to master.

What would you like to improve on?

What's a new idea you'd like to implement for the first time?

What activities can I do today, this week, and this month to immediately move towards my long-term goals?

When thinking about your goals, keep them measurable and easy to track. Write down at least 3 short-term goals below:

short-term goals

1

2

3

examples

-  Post on Facebook daily, and increase social engagement by 3%.
-  Subscribe to a system or technology related to marketing.
-  Implement a daily time blocking strategy where I will contact 10 people from my Sphere of Influence (SOI) weekly.
-  Register for education on topics such as Facebook, email campaigns, print marketing systems, and more.
-  Gain at least 30 new followers per week.
-  Find an accountability partner to meet with weekly to review completed tasks.

Long-Term Goals and Actions

Long-term goals will generally have a financial or transactional value associated with them. While they are “long-term,” they must be reviewed consistently to determine if you are moving in the right direction.

Remember to associate with each goal with a marketing objective. These should also be very specific to increase your marketing plans’ effectiveness and tangibility.

LONG-TERM GOALS AND ACTIONS step one

long-term goals

-
-
-

examples

-  Build a strong marketing presence to help increase listing leads from farm areas by 25% by this time next year.
-  Transition into selling luxury properties through new networking and marketing channels.
-  Within 12 months, consistently generate 15 new buyer leads per month.
-  Increase SOI network by 20 to 40 new high-quality contacts by attending an additional 2-4 networking and social events.

Challenge

Imagine you are standing at a podium, pitching to a room of qualified buyers and sellers. In 30 seconds or less, you have to define your brand.

What makes you unique?

What would compel them to choose you over other talented and experienced agents?

Can you communicate your brand with passion and clarity?

Review the descriptive words below and check the ones that align with your brand.

Bold	Credible	Efficient
Sincere	Rational	Reliable
Honest	Persistent	Selective
Exclusive	Dutiful	Considerate
Fearless	Service	Superior
Brave	Advocate	Thoughtful
Trustworthy	Authority	Devoted
Respectful	Capable	Principled
Caring	Compelling	Dedication
Luxurious	Persuasive	Loyal
Chic	Competent	Accurate
Elegant	Professional	Dependable
Authentic	Accomplished	Likeable
Genuine	Qualified	Charming
Direct	Talented	Fun
Outspoken	Skilled	Outgoing
Straightforward	Responsible	Magnetic
Legitimate	Keen	Passionate
Devoted	Composure	Secure

step one

Draw from the words on the previous page and use the questions below as inspiration to craft your brand message

What my clients **appreciate** about me the most:

My **promise** to my clients:

What makes me **different** from other agents:

The most **important** thing I do for my clients:

My Brand Message

There are no rules for writing your brand message and it doesn't necessarily have to appear on your marketing materials. However, this message is a guidepost for your business and should be a central part of your "Business DNA." Every time you meet a new prospective customer, this message should be ingrained in their experience.

examples

I provide my clients with a highly-personalized, hassle-free home buying or selling experience. This exceptional client service is made possible by an exclusive process I've developed over my 15 years of experience as a real estate professional. This process and my sincere devotion to client advocacy ensures my clients have the best possible transaction.

My brand message:

“

Your premium brand had better be delivering something special, or it's not going to get the business. ~ Warren Buffet

”

REVIEWING PAST EFFECTS
 step one

What Worked?

Get ready to put in some important work during this critical step. Reviewing past successes and failures is crucial as you develop your Marketing Action Plan. If your CRM has this information, great! If not, you'll want to go back and look at each transaction and note the sources.

Are new clients coming to you from the same sources?

Do you notice a pattern?

Property Address	Sales Price	Date	Marketing Source	Marketing Budget
31 53rd Court Jonesboro, GA 30236	\$500k	3/4/22	FB Ad Campaign	\$500.00

What Didn't Work?

Knowing which marketing techniques to avoid is just as important as knowing which ones work best. Make a list of the marketing activities that you received little or no return on in the past year. You can also use the spreadsheet in the previous step for this assignment.

Marketing activities that **did not work**:

 REVIEWING PAST EFFECTS
 step two


Check out the tracking spreadsheet we've create to help you organize your past business sources. It can be found on the web page where you downloaded this plan.

PLANNING YOUR BUDGET
step one

Start-up Cash

It's an old but true cliché: You have to spend money to make money. What financial resources will you allocate to marketing and lead generation this year? This step is simple, but your budget isn't a reality until you put it in writing. Planning your budget ahead of time will keep you from overspending and will allow you to make the most of your money.

How much start-up cash do you have available for marketing?

PLANNING YOUR BUDGET
step two

Create a Detailed Budget

You can create a detailed budget by downloading the budget spreadsheet that accompanies this workbook or you can use the spreadsheet on the following page to manually fill in your budget.

After completing your budgeting plan, compare your startup cash amount in the previous step with the overall total in your spreadsheet. Ideally, the totals should be similar. If not, take a look at your budget and make sure you are not allocating resources to channels that did not work in the past.

“

The man who stops advertising to save money is like the man who stops the clock to save time. ~ Thomas Jefferson

”

MARKETING BUDGET													
	Jan	Feb	March	April	May	June	July	Aug	Sept.	Oct.	Nov.	Dec.	TOTAL
PRINT													
Postcards													\$ -
Newsletters													\$ -
Letters													\$ -
Other													\$ -
PRINT TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
MASS MEDIA													
Newspaper													\$ -
Magazine													\$ -
Paid Outdoor Ads													\$ -
Personal Website													\$ -
Other													\$ -
MASS MEDIA TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
ONLINE													
Social Media Ads													\$ -
Website													\$ -
CRM Subscription													\$ -
Emails													\$ -
Google Adwords													\$ -
Other													\$ -
ONLINE TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
FACE-TO-FACE													
Open Houses													\$ -
Coffee/Meal Meetings													\$ -
Networking Events													\$ -
Promotional Parties													\$ -
Other													\$ -
FACE-TO-FACE TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
OVERALL TOTALS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

january

week 1

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 2

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 3

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 4

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

Monthly Budget

\$

Monthly Goals

Notes

february

week 1

mon: _____

tue: _____

wed: _____

thu: _____

fri: _____

sat: _____

sun: _____

week 2

mon: _____

tue: _____

wed: _____

thu: _____

fri: _____

sat: _____

sun: _____

week 3

mon: _____

tue: _____

wed: _____

thu: _____

fri: _____

sat: _____

sun: _____

week 4

mon: _____

tue: _____

wed: _____

thu: _____

fri: _____

sat: _____

sun: _____

Monthly Budget

\$

Monthly Goals

Notes

march

week 1

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 2

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 3

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 4

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

Monthly Budget

\$

Monthly Goals

Notes

april

week 1

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 2

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 3

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 4

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

Monthly Budget

\$

Monthly Goals

Notes

may

week 1

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 2

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 3

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 4

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

Monthly Budget

\$

Monthly Goals

Notes

june

week 1

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 2

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 3

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 4

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

Monthly Budget

\$

Monthly Goals

Notes

july

week 1

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 2

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 3

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 4

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

Monthly Budget

\$

Monthly Goals

Notes

august

week 1

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 2

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 3

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 4

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

Monthly Budget

\$

Monthly Goals

Notes

september

week 1

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 2

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 3

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 4

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

Monthly Budget

\$

Monthly Goals

Notes

october

week 1

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 2

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 3

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 4

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

Monthly Budget

\$

Monthly Goals

Notes

november

week 1

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 2

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 3

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 4

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

Monthly Budget

\$

Monthly Goals

Notes

december

week 1

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 2

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 3

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

week 4

mon: _____
 tue: _____
 wed: _____
 thu: _____
 fri: _____
 sat: _____
 sun: _____

Monthly Budget

\$

Monthly Goals

Notes
