

# THRIVE2025

BUSINESS PLANNING



dream big.

work hard.

make it happen.

Marketing & Tech Training  
with Heather H Holliday  
[socialmarketingnut.com](http://socialmarketingnut.com)

EXCLUSIVE MATERIAL - DO NOT DUPLICATE



[illegible]

ask yourself.....

## vision

What is your vision for the future?

## value

What is your value proposition?

## where

Where will your business be?

## financial

What are your financial goals?

## primary goal

What are your financial goals?

## marketing

What marketing strategies will you use?

## activities

What are your daily and weekly activities?

## track

Are you on track? Are you where you want to be?

## MY PERSONAL VISION:

(What would you like to achieve by the end of 2025)

## MY PROFESSIONAL VISION:

(What would you like to achieve by the end of 2025)

# VISION BOARD

next  
year

5 years

10 years



*Dream... Believe... Inspire*

# Your Plan

**WHO** DO WE HAVE TO BE,  
WHAT DO WE **HAVE TO DO**,  
SO THAT WE CAN  
**HAVE WHAT WE WANT.**

WE WILL **DREAM BIG**,  
FIND OUR **FUTURE FOCUS**, &  
STAY **ACCOUNTABLE**  
TO **ACHIEVE** OUR GOALS.

*Know your numbers!*

## **MEASURE & TRACKING**

**Print out all of your Listing & Sales for the Year.**  
Mark down where each of those deals came from.

Referral?  
Social Outreach?  
Organic Website Lead?  
PPC Lead?  
Zillow, etc Lead?  
FSBO?  
Expired?


**EVERY  
journey  
NEEDS A  
first  
STEP**

Using the following sheets, we will track and Measure the  
ROI of WHERE your Business is coming from.

**" IF YOU CAN NOT MEASURE IT,  
YOU CAN NOT IMPROVE IT."**

# Personal Expenses



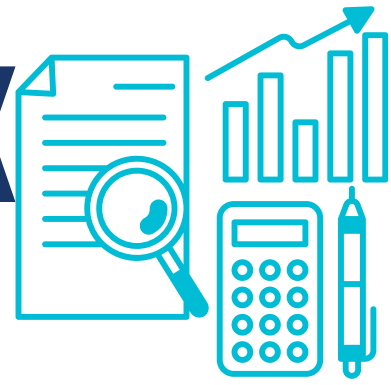
PERSONAL EXPENSES ▾ 		
Personal ▾	Current Year ▾	Notes
Food - Groceries		
Mortgage / Rent		
Home Insurance		
Utilities (Electricity, Gas, Water, Trash)		
Internet / Cable		
Phone Bill		
Health Insurance		
Car Payment		
Car Insurance		
Credit Card Payments		
Other Loan Payments		
Entertainment and Hobbies		
Transportation (Gas, Public Transit, Tolls)		
Clothing		
Personal Care (Salon, Spa, Grooming)		
Healthcare (Medical, Dental, Vision, Prescriptions)		
Household Maintenance		
Gifts and Donations		








DOWNLOAD NOW



# Business Expenses



Business  		
Business Expenses	  Current Year	 Notes
Membership Dues (e.g., NAR, local real estate boards)		
Coaching		
Networking Events/Conferences		
Continuing Education and Licensing Fees		
Professional Fees (Accountants, Bookkeepers)		
Office Supplies (Printer Paper, Ink, etc.)		
Business Insurance (Liability, E&O)		
Phone and Internet Services		
Software Subscriptions (e.g., CRM, Canva, Ripl, AgentCrate)		
Car Lease/Payment (if a separate business vehicle)		
Fuel and Maintenance for Business Travel		
Meals and Entertainment (Client Meetings)		
Transaction Fees (per listing or sale)		
Courier or Shipping Costs		
Professional Photos for Listings		
Technology Upgrades (Laptop, Phone)		
Office Equipment Maintenance		



DOWNLOAD NOW

# Marketing Expenses



Marketing ▾



Marketing Expenses



Current Year



Deals / Appts



Notes



Social Media Advertising (Facebook, Instagram)

Google Ads

Email Marketing Platform Fees

Website Hosting and Maintenance

Marketing Materials (Print Flyers, Brochures)

Virtual Tour or Video Services (subscription)

Listing Signage and Riders

Open House Costs (refreshments, signage)

Client Gifts (Closing Gifts, Referral Gifts)

Photography and Videography for Listings

Staging or Virtual Staging Services

Direct Mail Campaigns (Postcards, Letters)

Branded Merchandise (Pens, Notepads, Swag)

Community Event Sponsorships

Professional Photography for Brand Assets

Annual Client Appreciation Events

Print Advertising (e.g., local newspapers or magazines)

Promotional Items (Calendars, Custom Gifts)



DOWNLOAD NOW

**GCI** (Gross Commission Income) \$ \_\_\_\_\_

**Business Expenses** (from Homework) \$ \_\_\_\_\_

**Profit** \$ \_\_\_\_\_

**TOTAL Closed Transactions** \_\_\_\_\_

**Listings Sold** \_\_\_\_\_

**Listing Appointments** \_\_\_\_\_ **Listings Taken** \_\_\_\_\_

**Buyer Sales** \_\_\_\_\_

**Buyer Appointments** \_\_\_\_\_ **Buyers Worked With** \_\_\_\_\_

**Average Commission per Transaction** \_\_\_\_\_

**Average Hours Worked / Week** \_\_\_\_\_

**Hours Spent Prospecting / Week** \_\_\_\_\_

# MY HISTORY

## 2024 BUSINESS REVIEW:

sales volume

\$

gross commission

\$

transactions

#

appointments

#

listings # | buyers # | referrals # | other #

-----

-----

*Top Sources:*

MEASURE & TRACKING WHERE  
YOUR BUSINESS IS COMING FROM.

---

---

---

---

# MY FUTURE

AT LEAST A 25 % INCREASE FROM 2024

live  
your  
dream.

## What do you need to do...

sales volume

\$

gross commission

\$

transactions

#

appointments

#

listings #

| buyers #

| referrals #

| other #

-----

-----

-----

-----

Sources / Notes:

POSITIVE ROI / KEEP, POSSIBLE INCREASE:

-----

NEEDS MORE ATTENTION:

-----

CANCEL:

-----

"SETTING GOALS IS THE FIRST STEP IN TURNING  
THE INVISIBLE INTO THE VISIBLE".

# MY FUTURE

## Target Take Home

TOTAL ANNUAL EXPENSES



\$ \_\_\_\_\_

TOTAL ANNUAL ASPIRATIONS

\$ \_\_\_\_\_



REQUIRED NET REVENUE

\$ \_\_\_\_\_

TRUST  
\* the \*  
PROCESS

It is UNACCEPTABLE for my business  
to profit LESS than:

\$ \_\_\_\_\_

"TURN YOUR SHOULD INTO A MUST!"

# CLIENT RELATIONS MANAGEMENT

**KEEP  
GROWING**

A real estate agent's success relies not only on generating leads but also on nurturing and maintaining strong relationships with clients over time. Effective Client Relationship Management (CRM) goes beyond collecting contact information; it involves creating value for clients through timely communication, personalized service, and consistent engagement. Here are some strategies for you to strengthen your CRM, expand their database, and build long-term relationships that lead to repeat business and referrals.

**"YOU DON'T HAVE A LEADS PROBLEM.  
YOU HAVE A LACK OF ACTION PROBLEM."**

**-TOM FERRY**

# BUILDING YOUR DATABASE

## Networking and Outreach

Engage in community events, real estate seminars, and local gatherings to meet potential clients and gather new leads. Attending open houses, career fairs, and local charity events can provide opportunities to expand your database.

## Referral Program

Encourage your existing clients to refer friends and family by implementing a referral program that offers incentives for every successful referral. This approach can bring in quality leads since they are more likely to trust a service recommended by someone they know.

## Optimizing Social Media

Use social media platforms effectively by running ads targeting your local market and creating engaging content that encourages followers to join your mailing list for exclusive updates.

TIP: Using Squeeze Pages, Landing Pages (Guides), Blogs, etc to drive traffic to your website will help build your database.





# MONTHLY E-NEWSLETTERS

## Market Insights

Include data-driven insights on home values, sales trends, and market forecasts to establish yourself as a knowledgeable resource.

## Community Events

Share upcoming community events, new local businesses, or developments in the area that might interest homeowners or prospective buyers.



## Tips for Buyers and Sellers

Offer actionable advice tailored to different client segments, such as first-time homebuyers, investors, or homeowners looking to renovate.

A monthly e-newsletter is an efficient tool to keep clients informed and engaged. The content should provide valuable information that demonstrates your market expertise and helps clients understand current market trends.

Make sure each newsletter is visually engaging, mobile-friendly, and has clear calls to action (CTAs) for clients to get in touch with you or request specific services.

# HOLIDAY E-MAILS AND TOUCHPOINTS

## Key Holidays and Seasonal Greetings

Consider sending emails on major holidays (e.g., Thanksgiving, New Year, July 4th) and personal milestones like clients' birthdays or anniversaries of their home purchases.

## Valuable Offers or Content

During certain holidays, include special offers like a free home valuation or tips on home staging for the upcoming season.

## Personal Touch

Address clients by name and, where possible, include relevant personal touches, such as asking how they are enjoying their new home or offering neighborhood-related content.

*never  
give  
up*

Holiday e-mails are a fantastic way to stay top of mind while also showing your clients that you value them. Keep holiday messages simple, personalized, and genuine to maintain a positive brand image without being overly promotional.

# CRM TOOLS AND AUTOMATION

## Regular Market Reports

Automated market reports that provide recent sales, average property prices, and trends help educate clients on the current market status. Make sure they are sent out consistently, with options for frequency (weekly, bi-weekly, or monthly) depending on each client's preference.

## Personalized Listing Alerts

Based on clients' saved preferences, sending them updates on new listings, price changes, or off-market opportunities can keep them engaged and show your proactive approach. Ensure these alerts are timely and relevant, so clients see the value in remaining connected with you.

## CRM Integration

Use CRM software that integrates with the MLS (Multiple Listing Service) to create a seamless flow of information for your clients. This approach will save time and help you maintain high responsiveness to client needs.

## Automation for Lead Nurturing

Set up automated sequences for lead nurturing, so each new lead receives a tailored series of emails that educate them about the market, introduce your services, and prompt them to take action. Automation can help keep clients engaged without requiring constant manual effort.



Market reports, listing alerts and automation lead nurturing are essential tools for keeping leads engaged, especially those in the consideration phase of buying or selling.

# FOLLOW-UPS AND RELATIONSHIP-BUILDING ACTIVITIES



## Quarterly Check-ins

For active leads, schedule quarterly check-ins to stay updated on their current needs and offer any new relevant information.

## Client Appreciation Events

Host events such as client appreciation nights, webinars, or virtual Q&A sessions about the real estate market. These activities foster a sense of community and can help you gain referrals.

## Personal Touchpoints

For high-priority clients, consider adding personal notes or small gifts on notable dates. This practice goes a long way in building rapport and fostering loyalty.

Following up regularly is vital in keeping relationships warm and establishing yourself as a go-to resource for clients.

# MARKETING PLAN

staying accountable all year



# REMEMBER

Marketing is Lead Gen.

# MARKETING PLAN

## TOPIC IDEAS

- Team Marketing Plan (including team members)
- Individual Agent Plan
- Brokerage Marketing Plan
- Traditional Marketing Plan
- Online Marketing
- Social Media Plan
- Consistency Plan
- Challenge Plan



# MARKETING IDEAS

## JIMMY MACKIN

- Use Multiple Platforms (don't put your eggs in one basket)
- What is your super power
- Go deep, not wide (ideal client)
- What can you do to drive conversations
- Farming is sexy again - direct mail, buyer letters
- Listing Marketing - not just about selling a home, it is selling your value
- Your Database = GoldMine
- 1M+ did not list / buy because of elections (regardless of who wins, historically this always happens)
- Top of Inbox = Top of Mind

**“GOOD MARKETS CREATE BAD HABITS” - JIMMY MACKIN**

# QUESTIONS TO ASK...

*Believe  
in  
Yourself*



*All <sup>THINGS</sup>  
are  
POSSIBLE*

- What is your yearly goal?
- What is your quarterly goal?
- What is your monthly goal?
- What is your weekly goal?
- What are your daily to do list to achieve your goals?

**“WHEN YOU MEASURE PERFORMANCE,  
PERFORMANCE IMPROVES” - TOM FERRY**



# SELF DISCOVERY QUESTIONS

- Do you have a game plan to make you stand out? Example: What do you enjoy outside of real estate? What are you known for?
- What are you most excited about achieving with a marketing plan?
- What is your biggest fear, or obstacle with your marketing plan?

★  
♥ be the ♥ ★  
• **BEST.**  
version  
of ★ you



YOU  
DON'T  
NEED TO BE  
AN EXPERT  
TO DO  
SOMETHING  
GREAT

Incorporate personal share to humanize

People want to Like, Trust, Know you  
in that order.

Allow them to get to know you

**"Social media won't replace a handshake,  
BUT social DONE WELL will change the first meeting  
from a handshake to a hug."**

-Valerie Garcia

# SOCIAL PLAN AHEAD:

- What is going in your week that you can post about?
- How do each of your posts, reels etc. perform?
- Are you tracking your insights?



THINK IT.  
WANT IT.  
GET IT

# CHECK BRANDING:

- Is it unified and cohesive?
- Do you need to change, add, remove, or adjust anything?
- All accounts, urls, and personal hashtags should be unified.



# ONLINE PROFILES

Don't miss another opportunity. Ensure your online profiles are updated! Google Yourself!

- Professional Photo
- Bio & service areas
- Phone Number
- email
- website

☒ SOCIAL MEDIA PLATFORMS

☒ YOUR MLS

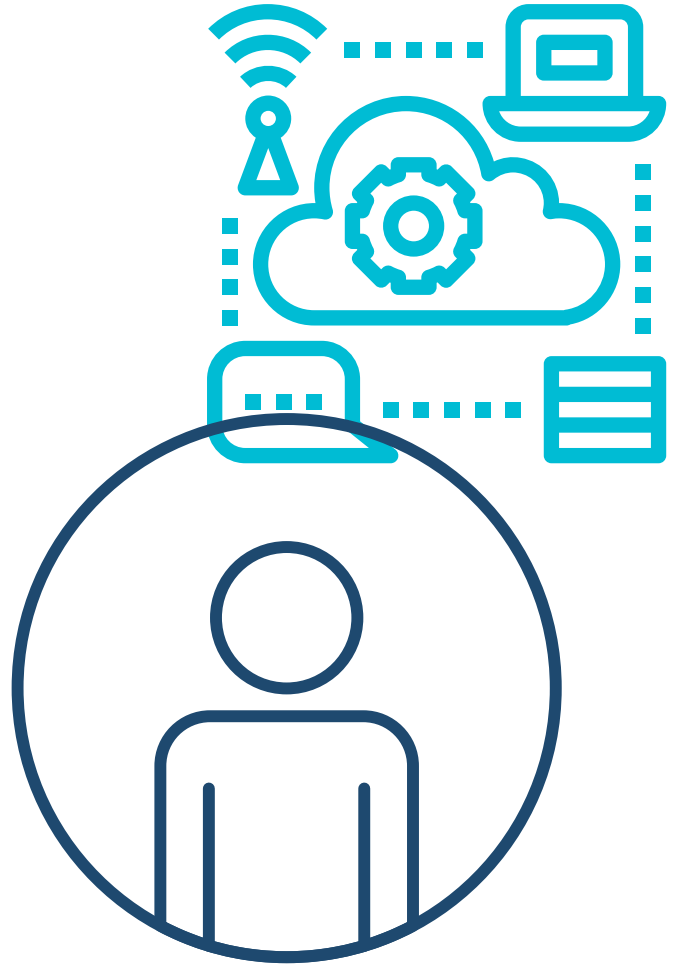
☒ GOOGLE BUSINESS

☒ ZILLOW

☒ REALTOR.COM

☒ HOMES.COM

☒ OFFICE / FRANCHISE



Anywhere else you show up in a search.

Use **Brandyourself.com** to have them assess your online presence and ways to improve profiles.

# WEBSITE CHECKLIST

- ✓ DO YOU HAVE A CUSTOM DOMAIN?
- ✓ HOW OFTEN DO YOU UPDATE YOUR SITE?
- DOES YOUR WEBSITE HAVE LOCAL RESOURCES, LINKS,
- ✓ AREA INFORMATION, ETC?
- ✓ DO YOU HAVE YOUR WEBSITE LISTED ON EVERY PRINT MARKETING YOU HAVE?
- ✓ DO YOU HAVE A CLEAR FOLLOW UP PLAN FOR LEADS?

## WEBSITE AUDIT:

Ideally your website should represent you, your brand and your local area. Make your website a HUB of information for consumers looking to buy / sell. Even better, add blogs with the top questions you get all the time to keep content fresh and relevant, these will also give you content for social! Even better, create videos for content! :-)



# SOCIAL MEDIA



- ☒ PERSONAL ACCOUNT IS LINKED TO YOUR BUSINESS PAGE
- ☒ PERSONAL PAGE HAS YOUR WEBSITE, OTHER SOCIAL & CONTACT INFO
- ☒ BUSINESS PAGE HAS A CTA BUTTON
- ☒ USING STORIES CONSISTENTLY

## BUSINESS PAGE AUDIT:

Go through your posts, look at the reach & engagements for each post. Better yet, go into your insights and really dive into when is the best time / day for posts, which posts are getting the best engagement and work on a plan to incorporate those types of posts.

# SOCIAL MEDIA



## Instagram

- ✓ YOUR NAME AND @USERNAME REFLECT YOUR BUSINESS
- ✓ YOUR BIO CLEARLY STATES YOU ARE AN AGENT & AREA
- ✓ YOUR WEBSITE IS LINKED IN BIO (WE RECOMMEND LINKTREE)

### INSTAGRAM AUDIT:

- **Do you have Personal / Creator / Business Account?**  
We recommend a Creator or Business account for insights
- **Are you using Stories Consistently?**
- **Are you taking advantage of "Highlights"**
- **Follow local businesses and engage with them.**



# SOCIAL MEDIA



- ✓ YOUR NAME AND @USERNAME REFLECT YOUR BUSINESS
- ✓ CUSTOM COVER PHOTO
- ✓ WEBSITE LINKS ON COVER
- ✓ INTRO VIDEO FOR NON SUBSCRIBERS
- ✓ PLAYLISTS AND DASHBOARD SET UP WITH PLAYLISTS

## YOUTUBE AUDIT:

- Create Playlists, you can do this from videos across YouTube (Example, go to the RE/MAX Channel and create playlists from their videos) - Easily create playlists for National Housing Reports, Own It Series, Fit to Sell Series, etc
- Go to [remaxhustle.com](https://remaxhustle.com), create all available branded commercials and UPLOAD to your channel!



# CREATING YOUR ROADMAP FOR SUCCESS

"PLAN YOUR WORK AND WORK YOUR PLAN."

WHAT ARE **10** THINGS YOU  
WILL DO CONSISTENTLY?

↓ ↓  
**MAKE IT  
HAPPEN**

"INSANITY: DOING THE SAME THING  
OVER AND OVER AGAIN AND  
EXPECTING DIFFERENT RESULTS."

↓ ↓  
**IDEAS**

INTERNET LEAD GEN  
COMMUNITY EVENTS  
STRATEGIC ALLIANCES  
ADVERTISING  
DOOR KNOCKING  
FSBO  
EXPIREDS  
OPEN HOUSES  
SOCIAL MEDIA  
GEO FARMING  
POSTCARDS  
DIRECT MAIL

POSTCARDS  
SEND NOTE CARDS  
CLUBS / COMMITTEES  
DISTRESSED OWNERS  
NEW CONSTRUCTION  
RELOCATION  
ABSENTEE OWNERS  
RADIO / ADS  
SEMINARS / WEBINARS  
PODCAST / LIVE VIDEOS  
VIDEO MESSAGES  
SOCIAL, VIDEOS, ETC

# KNOWING WHAT I KNOW NOW...

**MORE OF**

**LESS OF**

≡STAY≡  
*Humble  
Hustle*  
HARD

**START DOING**

**STOP DOING**

**" EITHER RUN THE DAY OR THE DAY RUNS YOU."**

# WHAT DOES YOUR DAY LOOK LIKE?

## Set up a morning routine.

Exercise

Mindset routine

GOOD  
MORNING

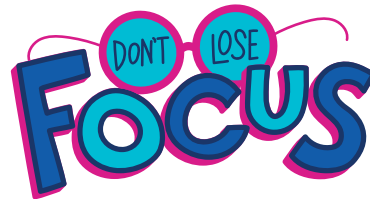


Get to the office at  
the same time daily.

## Business Morning Routine

5/5/4/2

Hot Sheets



Managing Business,  
transactions, marketing

Appointments



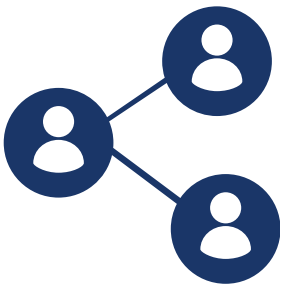
"YOU'LL NEVER CHANGE YOUR LIFE UNTIL YOU CHANGE SOMETHING YOU DO DAILY. THE SECRET OF YOUR SUCCESS IS FOUND IN YOUR DAILY ROUTINE."



# HAVE REAL ESTATE CONVERSATIONS



- phone
- note cards
- social engagement & relationships
- newsletters (with replies / that start conversations)
- personal video emails



# TOM FERRY'S

## 5-5-4-2 POWER HOUR

### 5 CALLS / TXT WITH PAST CLIENTS / CENTER OF INFLUENCE

NAMES

NOTES

### 5 NEW CONVERSATIONS, NEW CONTACTS

NAMES

NOTES

### 4 LEAD FOLLOW UP CONVERSATIONS

NAMES

NOTES

### 2 SOCIAL POSTS, TRY VIDEOS!

PLATFORM

TYPE OF POST

" A GOAL WITHOUT A PLAN IS JUST A WISH."

# BREAK IT DOWN

## GOALS BY MONTH DO - DOING - DONE



WRITE 3 ITEMS FOR EACH MONTH (DON'T FORGET TO ADD PERSONAL THINGS)

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER



## January - Preparation and Planning

- **Goal Setting:** Define clear, measurable goals for the year (e.g., number of houses to sell/buy, revenue targets).
- **Budget Allocation:** Set a budget for marketing and advertising efforts.
- **Website Update:** Revamp your website to ensure it's up-to-date with the latest listings and has a fresh look for the new year.
- **CRM System Review:** Ensure your customer relationship management system is optimized for the year ahead.

## February - Branding and Outreach

- **Branding Campaign:** Launch a campaign to strengthen your brand. Update logos, slogans, and promotional materials.
- **Social Media Plan:** Draft and begin executing a social media calendar.
- **Local Partnerships:** Establish partnerships with local businesses for cross-promotions.
- **Networking Events:** Plan to attend or sponsor at least one local community event each month.

## March - Digital Marketing Kick-off

- **SEO Optimization:** Start an SEO campaign to improve the visibility of your online listings.
- **Content Marketing:** Begin a blog or video series related to home buying/selling tips.
- **Email Marketing:** Send out a monthly newsletter to your database.
- **PPC Campaigns:** Initiate Pay-Per-Click advertising on Google and Social Media.

## April - Spring Market Preparation

- **Listing Promotions:** Amplify marketing efforts for new spring listings.
- **Open Houses:** Schedule and market open house dates.
- **Direct Mail:** Send out 'Just Listed' and 'Just Sold' postcards in target areas.
- **Community Involvement:** Volunteer or sponsor a local event to increase visibility.

## May - Client Engagement

- **Referral Program:** Launch a referral program offering incentives for past clients to refer new clients.
- **Client Appreciation Event:** Plan and invite clients to an exclusive event.
- **Testimonials:** Gather and share client testimonials on various platforms.

## June - Mid-Year Review

- **Performance Analysis:** Review the results of marketing efforts and adjust strategies as necessary.
- **Survey:** Send out a mid-year survey to clients for feedback on your services.
- **Local Market Report:** Publish a mid-year market report to establish thought leadership.

## July - Interactive Marketing

- **Virtual Tours:** Implement or enhance virtual tours for listings.
- **Webinar Series:** Start a series of webinars on home buying/selling processes.
- **Interactive Content:** Create quizzes or eBooks for website visitors.

## August - Expansion Strategies

- **New Territories:** Explore and market in new geographical areas.
- **Partnership Marketing:** Co-host events or webinars with mortgage brokers or home inspectors.
- **Influencer Collaboration:** Partner with local influencers to promote your services.

## September - Social Proof

- **Raving Reviews:** Publish successful client testimonials highlighting how you've helped clients.
- **Data-Driven Social Media Posts:** Share insights about the local real estate market, including infographics on market trends.
- **Video Market Updates:** Create monthly market update videos to share with your network.

## October - Offline Marketing Push

- **Billboards and Benches:** Invest in local outdoor advertising.
- **Community Events:** Host a Halloween event for branding and networking.
- **Sponsorships:** Sponsor local sports teams or events for increased visibility.

## November - Holiday Marketing

- **Holiday-Themed Listings:** Showcase homes ready to enjoy the holiday season.
- **Gift Baskets:** Send thank-you gifts to your top clients and referrals.
- **Holiday Event:** Host a holiday-themed open house.

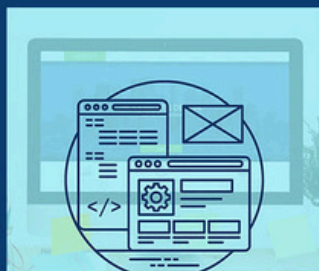
## December - Review and Renew

- **Annual Review:** Analyze what worked and what didn't throughout the year.
- **Client Outreach:** Reach out to clients with season's greetings and a year-end update on the real estate market.
- **2026 Planning:** Start planning for the next year based on the insights gained.
- **Rest and Recharge:** Take time to relax and prepare for the coming year.

# Can we help?



## CHECK OUT OUR SERVICES



### BoldTrail Websites

BoldTrail | kvCORE website resources or design services. Let's get your site up and running for your office, team or agents! We also have plenty of resources, tips, tutorials & more!

[LEARN MORE >](#)

### Broker HUB Website

Agents are loving this one stop shop for all of their real estate needs! Add all of your agent information links & goodies to one website along with your office events and so much more!

[LEARN MORE >](#)

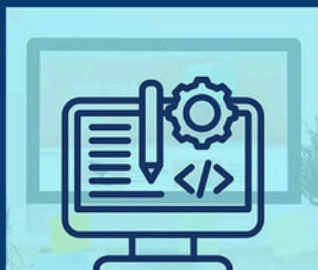
### Broker Digital Services

Custom Social Graphics, Website Management, Newsletters, Agent Hub, Agent Coaching and so much more!

[LEARN MORE >](#)

### Agent Social Media Mgt

Custom Social, newsletters, blogs, website management, and so much more! All roads lead back to your custom website!

[LEARN MORE >](#)

### Lofty Websites

If you need help getting your site set up with your own look & feel, set up neighborhoods, move over content from another website, we are here to help!

[LEARN MORE >](#)

### Coaching & Office Classes

Looking for help with your BoldTrail, Marketing, Canva Help? Onboarding a new team member and need help training them on RE/MAX Tools? Learn more about my classes or 1:1 Coaching!

[LEARN MORE >](#)

### Learn & Shop

Looking for Monthly Marketing Content Calendar, Graphics, Canva Templates & Video Tutorials? Check out our NEW store for all sorts of goodies!

[LEARN MORE >](#)

### Classes - Events

Monthly Masterminds, live classes and so much more. Check out our list of upcoming classes!

[LEARN MORE >](#)

# socialmarketingnut.com

HEATHER H HOLLIDAY | #THRIVE2025

**THRIVE2025**  
BUSINESS PLANNING



This image shows a blank 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.

This image shows a blank 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.



Lets make  
**2025** our best  
year ever!

" BY FAILING TO PREPARE, YOU ARE PREPARING TO FAIL."