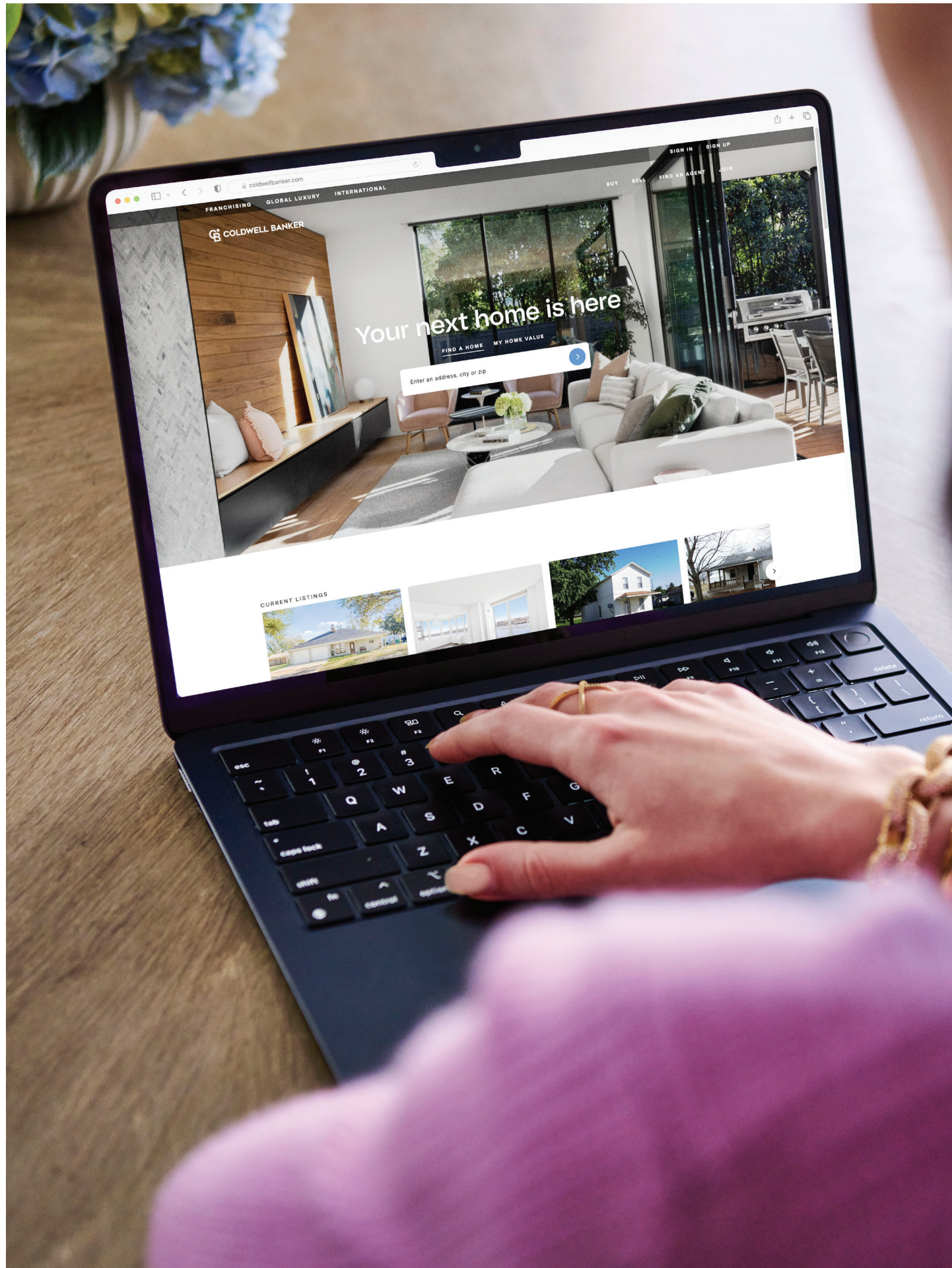


AGENT MARKETING PLAN

2024



**COLDWELL
BANKER**



STAY CONNECTED

According to NAR, 85% of people don't know how to get in touch with their agent¹. 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.

Affiliated agents who used MoxiEngage earned \$31.7K more and were 1.5X more productive²

Annually

- Schedule a holiday email campaign for all contacts (**MoxiEngage**)
- Set up topical email drip campaigns for your sphere, such as Home Improvement Tips, Home Security Tips, Coldwell Banker® Dream (**MoxiEngage**)
- Set up distribution of Quarterly Reports (**Prospect Square**)
- Schedule Neighborhood News Stats for your farming areas (**MoxiEngage**)
- Additional ideas _____

Monthly

- Set Market Reports up for prospects who are on the fence to keep them updated on what's happening in the market (**Prospect Square**)
- Opt-in to send monthly newsletters to clients, showcasing your or your office's listings (**Prospect Square**)
- Additional ideas _____

As the Opportunity Arises (MoxiEngage)

- Sellers – Set drip campaign such as Selling Opportunity, RealVitalize® Services, 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 _____

1. NAR Buyer and Seller Profile Report 2022. 2. Based on average commission amount of active agents with affiliated companies (Coldwell Banker, CENTURY 21, Better Homes and Gardens Real Estate and ERA) with production that performed an action in MoxiEngage between April 1, 2022-Dec. 31, 2022. Results are not guaranteed.

NOTE: If you choose to make contact by phone or text (i) check phone numbers against the federal DNC registry, any state DNC list and your company DNC list (ii) do NOT use autodialers and (iii) do NOT use artificial voice or pre-recorded messages.



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 and professionally printed locally.

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

- New business cards
- Banner signage
- International Buyer's Guide
- Listing Brochure
(available in both English and Spanish)
- Buyer Brochure
(available in both English and Spanish)
- Name badge
- CB Estimate® materials
- Move Meter® materials
- Dream campaign
- Postcards – Just Listed/Just Sold, housiversary, seasonal, etc.
- RealVitalize® – postcards, flyers, door hangers
- Prospecting – postcards, door hangers
- Additional ideas:

Refer to the Prospecting Calendar on pp. 11-22 for additional ideas.

Desk > Xpressdocs



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

- Customize social media assets for the month based on the Prospecting Calendar (see pp. 11-22) so you're ready to post (**Marketing Center**)
- Update Facebook header using images available on Marketing Center
- Post links to your Quarterly Reports or Area Reports (**Prospect Square**) with comments about what's happening in the market
- Pull ready-made social media assets from Market Quest showcasing where Coldwell Banker® is #1 in your area
- Additional ideas _____

Weekly

- Check Coldwell Banker Blue Matter and Coldwell Banker Global Luxury® blogs and share posts
- Check your local company's social media and share posts that will interest your followers
- Additional ideas _____

As the Opportunity Arises (MoxiEngage)

- Post unique features of your newest listing, but be careful not to only post your listings
- Use Boost to create an automated campaign that will run on Facebook, Instagram, the Nextdoor app and over 1,000 websites (**Desk > Boost**)
- Additional ideas _____

*Based on average commission amount of active agents with affiliated companies (Coldwell Banker, Better Homes and Gardens Real Estate, and ERA) with production that performed an action in Boost between Jan. 1-Dec. 31, 2022. Results are not guaranteed.

PROSPECTING CALENDAR

NOTE: Check-off as you accomplish your prospecting goals

FEBRUARY

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				1 <input type="checkbox"/> Postcard: Valentine's Day (Feb. 14) <input type="checkbox"/> Social/Email: Black History Month <input type="checkbox"/> Email: Neighborhood News	2 <input type="checkbox"/> Social/Email: Groundhog Day	3
4	5	6 <input type="checkbox"/> Social/Email: CB Dream	7	8 <input type="checkbox"/> Social/Email: FSBO	9	10
11	12 <input type="checkbox"/> Social/Email/Postcard: RealVitalize®	13	14 <input type="checkbox"/> Social/Email: Valentine's Day	15	16	17 <input type="checkbox"/> Social/Email: Energy Saving Tips
18	19 <input type="checkbox"/> Social/Email: Presidents' Day	20 <input type="checkbox"/> Social/Email: Love Your Pet Day	21	22	23	24
25	26 <input type="checkbox"/> Social: Home Buying and Selling Lead Generation	27	28 <input type="checkbox"/> Postcard: Tax Tips	29		

*RealVitalize is available in select markets only.

NOTE: If you choose to make contact by phone or text (i) check phone numbers against the federal DNC registry, any state DNC list and your company DNC list (ii) do NOT use autodialers and (iii) do NOT use artificial voice or pre-recorded messages. Emails must follow CAN-SPAM rules. You should also check to make sure you follow the Do Not Email/Unsubscribe Requests.

PROSPECTING CALENDAR

MARCH

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1 <input type="checkbox"/> Social/Email: Women's History Month <input type="checkbox"/> Postcard: St. Patrick's Day <input type="checkbox"/> Email: Neighborhood News	2
3	4 <input type="checkbox"/> Social: Now Might Be the Right Time to Sell	5	6 <input type="checkbox"/> Social/Email/Postcard: RealVitalize®	7	8 <input type="checkbox"/> Social: International Women's Day <input type="checkbox"/> Email: Daylight Savings Time (March 10)	9 <input type="checkbox"/> Social: Daylight Savings Time (March 10)
10 <input type="checkbox"/> Social: Ramadan	11 <input type="checkbox"/> Social: Quotables & Stats 2023	12	13 <input type="checkbox"/> Social: Home Buying and Selling Lead Generation <input type="checkbox"/> Email: Selling Your Home <input type="checkbox"/> Postcard: Baseball Schedules, Easter	14	15	16
17 <input type="checkbox"/> Social/Email: St. Patrick's Day	18	19 <input type="checkbox"/> Social/Email: First Day of Spring	20	21 <input type="checkbox"/> Social: Quotables & Stats 2023	22	23
24	25 <input type="checkbox"/> Social: Home Buying and Selling	26	27	28 <input type="checkbox"/> Social: Quotables & Stats 2023	29	30
31 <input type="checkbox"/> Social: Easter						

NOTE: Check-off as you accomplish your prospecting goals

*RealVitalize is available in select markets only.

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PROSPECTING CALENDAR

NOTE: Check-off as you accomplish your prospecting goals

APRIL

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1 <input type="checkbox"/> Social/Email: Fair Housing Month <input type="checkbox"/> Email: Neighborhood News	2	3 <input type="checkbox"/> Social/Email: Arab American Heritage Month	4	5 <input type="checkbox"/> Social: Quotables & Stats 2023 <input type="checkbox"/> Postcard: Earth Day (April 22)	6
7	8 <input type="checkbox"/> Social: Quotables & Stats 2023	9	10	11 <input type="checkbox"/> Social/Email: Eid al-Fitr	12	13
14	15	16	17 <input type="checkbox"/> Social/Email/Postcard: RealVitalize®	18	19 <input type="checkbox"/> Social/Email: CB Dream	20
21	22 <input type="checkbox"/> Social/Email: Earth Day <input type="checkbox"/> Social/Email: Passover	23	24 <input type="checkbox"/> Social/Email: Admin. Professionals Day	25	26	27
28	29 <input type="checkbox"/> Postcard: Mother's Day (May 12) <input type="checkbox"/> Social: Home Buying and Selling Lead Generation <input type="checkbox"/> Email: Home Improvement Tips – Outdoor Appeal	30				

*RealVitalize is available in select markets only.
NOTE: If you choose to make contact by phone or text (i) check phone numbers against the federal DNC registry, any state DNC list and your company DNC list (ii) do NOT use autodialers and (iii) do NOT use artificial voice or pre-recorded messages. Emails must follow CAN-SPAM rules. You should also check to make sure you follow the Do Not Email/Unsubscribe Requests.

PROSPECTING CALENDAR

NOTE: Check-off as you accomplish your prospecting goals

MAY

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1 <input type="checkbox"/> Social/Email: New Homeowners Day <input type="checkbox"/> Social/Email: Asian-Pacific American Heritage Month <input type="checkbox"/> Email: Neighborhood News	2	3 <input type="checkbox"/> Social/Email: Military Appreciation Month	4
5 <input type="checkbox"/> Social/Email: Cinco de Mayo	6	7 <input type="checkbox"/> Social/Email: Jewish American Heritage Month	8	9 <input type="checkbox"/> Social/Email: CB Dream	10	11
12 <input type="checkbox"/> Social/Email: Mother's Day	13 <input type="checkbox"/> Postcard: Memorial Day (May 27)	14	15	16 <input type="checkbox"/> Social: Home Buying and Selling Lead Generation	17	18
19	20 <input type="checkbox"/> Social/Email/Postcard: RealVitalize®	21	22 <input type="checkbox"/> Email: Home Improvement Tips – Boost Value	23	24	25
26	27 <input type="checkbox"/> Social/Email: Memorial Day	28	29	30	31	

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PROSPECTING CALENDAR

JUNE

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						1 <input type="checkbox"/> Social/Email: National Homeownership Month <input type="checkbox"/> Social/Email: Pride Month <input type="checkbox"/> Email: Neighborhood News
2	3 <input type="checkbox"/> Postcard: Father's Day (June 16)	4	5 <input type="checkbox"/> Postcard: First Day of Summer (June 20) <input type="checkbox"/> Postcard: Eid al-Adha (June 20)	6	7	8
9	10 <input type="checkbox"/> Social/Email: CB Dream	11	12	13	14 <input type="checkbox"/> Social/Email: Army Birthday <input type="checkbox"/> Social/Email: Flag Day	15
16 <input type="checkbox"/> Social/Email: Father's Day	17	18	19 <input type="checkbox"/> Social/Email: Juneteenth <input type="checkbox"/> Postcard: 4th of July	20 <input type="checkbox"/> Social/Email: First Day of Summer <input type="checkbox"/> Social/Email: Eid al-Adha	21	22
23	24	25	26 <input type="checkbox"/> Social: Home Buying and Selling Lead Generation	27	28 <input type="checkbox"/> Social/Email: Pride Month	29
30						

NOTE: Check-off as you accomplish your prospecting goals

*RealVitalize is available in select markets only.

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PROSPECTING CALENDAR

NOTE: Check-off as you accomplish your prospecting goals

JULY

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1 <input type="checkbox"/> Email: Neighborhood News	2	3	4 <input type="checkbox"/> Social/Email: 4th of July	5	6
7	8	9	10	11 <input type="checkbox"/> Social/Postcard: RealVitalize®	12	13
14	15	16 <input type="checkbox"/> Email: Move Meter® Match Up	17	18 <input type="checkbox"/> Social: Home Buying and Selling Lead Generation	19	20
21	22 <input type="checkbox"/> Social: CB Dream	23	24	25 <input type="checkbox"/> Email: Energy Saving Tips	26	27
28	29 <input type="checkbox"/> Email: Home Improvement Tips – Home Decor	30	31 Back to School Schedule			

*RealVitalize is available in select markets only.

NOTE: If you choose to make contact by phone or text (i) check phone numbers against the federal DNC registry, any state DNC list and your company DNC list (ii) do NOT use autodialers and (iii) do NOT use artificial voice or pre-recorded messages. Emails must follow CAN-SPAM rules. You should also check to make sure you follow the Do Not Email/Unsubscribe Requests.

PROSPECTING CALENDAR

NOTE: Check-off as you accomplish your prospecting goals

AUGUST

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				1 <input type="checkbox"/> Email: Neighborhood News	2	3
4 <input type="checkbox"/> Social/Email: Coast Guard Birthday	5	6 <input type="checkbox"/> Email: Move Meter® Match Up	7 Football Schedules	8	9	10
11	12 <input type="checkbox"/> Social: Home Buying and Selling Lead Generation	13	14	15 <input type="checkbox"/> Social/Email: CB Dream	16	17
18	19 <input type="checkbox"/> Postcard: St. Jude ¹	20	21 <input type="checkbox"/> Email: Home Improvement Tips – Curb Appeal	22	23	24
25	26	27 <input type="checkbox"/> Social/Email/ Postcard: Coldwell Banker®	28	29 <input type="checkbox"/> Social/Email/ Postcard: RealVitalize® ²	30	31

1. Only for agents who participate in CB Supports St. Jude program. 2. RealVitalize is available in select markets only.

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PROSPECTING CALENDAR

NOTE: Check-off as you accomplish your prospecting goals

SEPTEMBER

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1 <input type="checkbox"/> Email: Neighborhood News <input type="checkbox"/> Postcard: Basketball/Hockey Schedules	2 <input type="checkbox"/> Social/Email: Labor Day	3	4	5	6 <input type="checkbox"/> Postcard: First Day of Fall (Sept. 22)	7
8 <input type="checkbox"/> Social/Email: Grandparents' Day	9	10	11 <input type="checkbox"/> Social/Email: Patriot Day	12	13 <input type="checkbox"/> Social: Home Buying and Selling Lead Generation	14
15 <input type="checkbox"/> Social/Email: Hispanic Heritage Month	16	17	18 <input type="checkbox"/> Social/Email: Air Force Birthday <input type="checkbox"/> Postcard: Rosh Hashanah (Oct. 2)	19	20 <input type="checkbox"/> Social: Move Meter® Match Up	21
22 <input type="checkbox"/> Social/Email: First Day of Fall	23	24 <input type="checkbox"/> Social/Email: Yom Kippur	25	26	27	28
29	30 <input type="checkbox"/> Social/Email/ Postcard: RealVitalize®					

*RealVitalize is available in select markets only.

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PROSPECTING CALENDAR

NOTE: Check-off as you accomplish your prospecting goals

OCTOBER

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1 <input type="checkbox"/> Social/Email: National Disability Employment Awareness Month <input type="checkbox"/> Email: Neighborhood News	2 <input type="checkbox"/> Social/Email: Rosh Hashanah	3	4	5
6	7 <input type="checkbox"/> Social: Home Buying and Selling Lead Generation	8	9 <input type="checkbox"/> Social/Email: CB Dream	10	11	12
13 <input type="checkbox"/> Social/Email: Navy Birthday	14	15	16 <input type="checkbox"/> Social/Email: Boss's Day <input type="checkbox"/> Postcard: Halloween (Oct. 31)	17	18 <input type="checkbox"/> Postcard: Daylight Savings	19
20	21 <input type="checkbox"/> Social: CB Dream	22	23	24 <input type="checkbox"/> Social/Email/Postcard: RealVitalize®	25	26
27	28 <input type="checkbox"/> Postcard: Veterans Day (Nov. 11)	29	30	31 <input type="checkbox"/> Social/Email: Halloween <input type="checkbox"/> Social/Email: Diwali		

*RealVitalize is available in select markets only.

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PROSPECTING CALENDAR

NOTE: Check-off as you accomplish your prospecting goals

NOVEMBER

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1 <input type="checkbox"/> Social/Email: Native American Heritage Month <input type="checkbox"/> Email: Neighborhood News	2 <input type="checkbox"/> Social/Email: Dia de los Muertos
3 <input type="checkbox"/> Social/Email: Daylight Savings	4	5 <input type="checkbox"/> Social: Home Buying and Selling Lead Generation	6	7 <input type="checkbox"/> Social/Email/Postcard: RealVitalize®	8	9
10 <input type="checkbox"/> Social/Email: Marine Corps Birthday	11 <input type="checkbox"/> Social/Email: Veterans Day	12	13 <input type="checkbox"/> Postcard: Thanksgiving (Nov. 28)	14	15 <input type="checkbox"/> Postcard: Small Business Saturday (Nov. 30)	16
17	18	19	20	21	22 <input type="checkbox"/> Social/Email: CB Dream <input type="checkbox"/> Postcard: Happy Holidays	23
24	25	26	27	28 <input type="checkbox"/> Social/Email: Thanksgiving	29	30

*RealVitalize is available in select markets only.

NOTE: If you choose to make contact by phone or text (i) check phone numbers against the federal DNC registry, any state DNC list and your company DNC list (ii) do NOT use autodialers and (iii) do NOT use artificial voice or pre-recorded messages. Emails must follow CAN-SPAM rules. You should also check to make sure you follow the Do Not Email/Unsubscribe Requests.

PROSPECTING CALENDAR

NOTE: Check-off as you accomplish your prospecting goals

DECEMBER

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1 <input type="checkbox"/> Social/Email: Happy Holidays <input type="checkbox"/> Email: Neighborhood News	2	3 <input type="checkbox"/> Social/Email: International Day of Persons with Disabilities	4	5	6 <input type="checkbox"/> Postcard: First Day of Winter (Dec. 21)	7
8	9 <input type="checkbox"/> Social/Email: CB Dream	10	11 <input type="checkbox"/> Postcard: Christmas (Dec. 25), Hanukkah (Dec. 25), Kwanzaa (Dec. 26)	12	13 <input type="checkbox"/> Social/Email: National Guard Birthday	14
15 <input type="checkbox"/> Social: Home Buying and Selling Lead Generation	16	17	18 <input type="checkbox"/> Postcard: Welcome 2025	19	20	21 <input type="checkbox"/> Social/Email: First Day of Winter
22	23	24	25 <input type="checkbox"/> Social/Email: Christmas, Hanukkah	26 <input type="checkbox"/> Social/Email: Kwanzaa	27	28
29	30	31 <input type="checkbox"/> Social/Email: New Year's Eve				

SHOWCASE YOUR EXPERTISE

You can impress prospects by showing you are the agent who can get their home sold fast and for the right price by creating listing presentations that wow with **MoxiPresent**[®], our digital presentation and CMA tool.

- Choose from a suite of professionally designed buyer, seller and luxury presentations in **MoxiPresent**, which you can customize and update on the fly with live MLS data, video testimonials, charts and more.
- Highlight the power of **Listing Concierge** using the seller presentation in **MoxiPresent**, which can help you win the listing when sellers see your incredible property marketing program.
- Mention the Seller's Assurance Program, featured in the listing presentation in **MoxiPresent**, to show how you can use programs like **RealVitalize**[®] to sell their home².
- Create your own presentations for open houses and neighborhood tours and report market data that is updated in real time. Show clients what their commute will look like using **MoxiPresent**'s integration with INRIX Traffic. Then share your presentation via email, in print and on social media.
- Personalize your presentations by ordering semi-custom agent profile and testimonial pages through **Design Concierge**.
- Additional ideas: _____

Affiliated agents and teams who used MoxiPresent earned \$26.5K more and are 1.4X more productive¹



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1. Based on average commission amount of active agents with production that performed an action in MoxiPresent between Jul 1st, 2022 and Jun 30th, 2023. Results are not guaranteed. 2. RealVitalize is available in select markets only.

PROPERTY MARKETING

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

Get comprehensive, creative property marketing in minutes with our **Listing Concierge** program, all for a fraction of the market price. Simply visit **Desk > Listing Concierge** to get started and we'll help you handle the rest.

MAKE AN IMPACT

With Listing Concierge, you can win more listings by offering a marketing campaign your competitors can't match, prove your value by showing prospects you're worth your commission and turn one listing into three when happy clients refer you to their friends.

Reference your Agent Guide for a full list of region-specific details¹.

- Property Brochures
- Single-Property Website
- Property Tour Slideshow
- Just Listed & Just Sold eBlast
- Just Listed & Just Sold Postcards
- Targeted Online and Social Media Advertising

Listings involved in the program, Listing Concierge, close with a 2.4% higher commission rate.²



¹ Listing Concierge package contents vary by market. ² Based on Coldwell Banker Realty Listing Concierge usage data from Apr 1st, 2022 through Mar 31st, 2023 with an average sales price of properties marketed through Listing Concierge of \$653,899. Results are not guaranteed.

PROMOTE YOURSELF

ESTABLISH YOUR PERSONAL BRAND

Build on the powerful Coldwell Banker® brand name by creating your own complementary personal brand that helps you stand out from the competition. Offering semi-custom and custom design and copywriting services, Design Concierge can help you create a distinctive personal brand for all your marketing. Cost-effective a la carte options are available as well as packages, which include action plans that guide you on how to implement your personal brand marketing.

Affiliated agents and teams who used Design Concierge were 3.1X more productive and had 2.2X more units*

Which of the following would help you get noticed and grow your business?

- | | |
|--|---|
| <input type="checkbox"/> Advertising | <input type="checkbox"/> Personalized MoxiPresent® listing presentation |
| <input type="checkbox"/> Agent logo | <input type="checkbox"/> Personalized marketing templates for Listing Concierge |
| <input type="checkbox"/> Bio | <input type="checkbox"/> Postcards |
| <input type="checkbox"/> Brochure | <input type="checkbox"/> Signage |
| <input type="checkbox"/> Business card | <input type="checkbox"/> Social media headers |
| <input type="checkbox"/> Email signature | <input type="checkbox"/> Stationery |
| <input type="checkbox"/> Flyers | <input type="checkbox"/> Additional ideas _____ |
| <input type="checkbox"/> MoxiWebsites® | |

Start thinking about your personal brand and what makes you unique.

- What's your signature color? _____
- What's your favorite type of font? _____
- What's your style? _____
- What makes you unique among agents? _____
- What's your area of specialty? _____

2024 ACTION ITEMS

- If you already have a personal brand, make sure to update your marketing for 2024
- Update your headshot, bio and contact info on social media, coldwellbanker.com and all industry sites
- Update your email signature
- Update your personal website or order new MoxiWebsites® design through Design Concierge
- Include the Move Meter® and CB Estimate® widgets on your website
- Update your business card if anything has changed
- Additional ideas _____

*Based on average commission amount of active agents and teams with production between Jan. 1-Dec. 31, 2022 that placed an order within Design Concierge between April 19, 2019-Dec. 31, 2022. Results are not guaranteed.

EDUCATION

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 **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 CBUSM 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** for these classes:



What skills do you need to improve upon this year?

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

*Listings taken, closed units, and closed sales volume (collectively, the “Metrics”) were measured during this study. To calculate the results, we took a sample of 4,000 independent sales associates who had been affiliated with the Coldwell Banker® brand for at least a year prior to the study and who participated in CBU Learning Center learning classes and activities between Jan. 2020-Dec. 2021 (the “Sample Pool”) and entered their activities into REscoreboard. All sales associates included in the study completed one or more learning classes, each ranging in duration from a minimum of 3-22 hours. We measured the monthly Metrics generated by the sample pool during the 12 months prior to their taking any Coldwell Banker courses and then measured the monthly Metrics generated during the 12 months after the end date of each affiliated agent’s participation in the learning courses. This was not a controlled study; correlation does not equal causation. Past performance does not guarantee future results. Market conditions may influence results and there is no assurance any Coldwell Banker-affiliated sales associate will achieve the same or similar results.

NOTE: If you choose to make contact by phone or text (i) check phone numbers against the federal DNC registry, any state DNC list and your company DNC list (ii) do NOT use autodialers and (iii) do NOT use artificial voice or pre-recorded messages.

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: _____



*To be eligible for this program, the agent you refer cannot have been affiliated with the Coldwell Banker brand or any other Anywhere Real Estate brand within the past six months or qualify for other recruitment incentive programs offered by Coldwell Banker.

GLOSSARY

Boost – Automates real estate digital advertising campaigns for listings, open houses and more on Facebook, Instagram, Wave and across the web. (Page 10)

CBUSM 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. (Page 26)

Design Concierge – Build on the powerful Coldwell Banker® brand name by creating your own complementary personal brand, including a logo, bio, personal brochure, email signature, MoxiPresent® listing presentation, MoxiWebsites® and more. (Page 25)

Listing Concierge – Win the listing, prove your value and turn one listing into three with creative and consistent, digital-first property marketing handled on your behalf. (Pages 24)

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. (Page 9)

Market Quest – Access graphs that display MLS-based statistical data and reports on #1 market share claims, market position and market trends that are automatically generated based on user-applied filters, all pre-populated with your contact info. (Page 9)

MoxiEngage® – This CRM tool is designed to fit your unique selling needs by leveraging property data, encouraging long-term lead nurturing, driving repeat and referral business and keeping you on track to reach your goals. (Pages 7)

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. (Pages 23, 25 & 27)

MoxiWebsites® – An easy-to-use website builder that makes putting your best foot forward a simple task. Grow your brand, sphere and business with custom, branded websites. (Pages 5 & 25)

Prospect Square – Brings together all your contacts and all the ways you reach them into one central hub. Stay connected with clients and contacts by sending newsletters, property eBlast template and Market, Area and Quarterly Reports to showcase your expertise. (Pages 7 & 9)

RealVitalize® – Helps your sellers make inspiring home improvements with no money up front, including kitchen renovations, painting, staging, replacing flooring, enhancing curb appeal and more. (Pages 7, 8 & 23)

Referral Rewards – Referral Rewards is a powerful program that helps Coldwell Banker® affiliated agents generate a passive commission stream by introducing other successful agents to a career with the brand. (Page 27)

Xpressdocs – Order printed marketing materials, business cards, direct mail, property brochures and more. (Page 8)

QUESTIONS?

Connect with your broker or manager to discuss your marketing plans



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Third-Party Materials or Video - The views expressed in any program videos produced by independent third parties are not the views of Coldwell Banker and the use of such materials is not mandatory but instead is completely voluntary for you to use at your discretion. Furthermore, any statements in third-party educational material or made during any related program or meeting are not those of the Coldwell Banker brand. Any third-party materials, in any format (e.g., live, presentations, videos, etc.) contain suggestions and best practices about specific issues you may encounter for you to use at your discretion to assist you in your career as a real estate sales associate.

If you are attending a live program, the facilitator or presenter of the program is not an employee of the Coldwell Banker brand. The Coldwell Banker brand provides materials to the facilitator or presenter as a guide for addressing the particular subject matter. Coldwell Banker Real Estate does not require the facilitator or presenter to follow the materials verbatim. Any presentation attended by you may contain information, anecdotes or other material that has not been preapproved and is not endorsed by Coldwell Banker Real Estate. Each franchised office is independently owned and operated.

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Scripts - Any sample dialogue or script contains suggestions and is not intended to be used verbatim. The sample dialogue is designed to offer you suggestions for what you might say in some of the most common situations you may encounter as a real estate agent. These words are only a guide, however. The most effective dialogue will be the one that is authentically your own.

GENERAL GUIDELINES AND REMINDERS

Each affiliated sales representative and broker is responsible for complying with any consumer disclosure laws or regulations.

Wire Fraud - Wire fraud scams continue to affect the real estate industry. Given the ongoing risks of wire fraud previously shared by the Federal Trade Commission and the National Association of REALTORS®, it is imperative that brokers and agents continue to be vigilant to this very real threat.

Advertising Guidelines - Claims in advertisements should be truthful, should not be deceptive or unfair, and should be fact-based.

Website Considerations - If you have a website, you may consider Privacy Policies about how you intend to use any data you might collect over the Internet, and incorporating terms of use.

Copyright and Trademark Issues - Be mindful of using materials including but not limited to photos, videos, and music that may be copyrighted or trademarked. You must obtain permission to use any copyrighted or trademarked materials before using them.

General Guidance - The information herein is intended for informational purposes only and is not intended, nor shall it be deemed, to provide or offer legal or financial advice or guidance. We recommend you consult with your own advisor when dealing with any of the issues visited herein.

Do Not Call Registry - The FTC's Telemarketing Sales Rule helps protect US-based consumers from fraudulent telemarketing calls and gives them certain protections under the National Do Not Call Registry. Companies also need to be familiar with rules banning most forms of robocalling. If you or someone working on your behalf is telemarketing, know the dos and don'ts before you plan your strategy, including but not limited to the following:

1. Before making a sales call, you or a third-party vendor you hire should determine whether the consumer's phone number has been included on the National Do Not Call Registry and your company-specific Do Not Contact list. We recommend that you speak to your broker about compliance with these rules.
2. Any sales calls or communications to consumers must follow the requirements of the Telephone Consumer Protection Act ("TCPA"), state and local telemarketing laws, including but not limited to requirements that messages or calls may not be sent using an automatic telephone dialing system or an artificial or prerecorded voice unless you have express written consent from the consumer.

We recommend that you review your local MLS rules and regulations regarding the proper use of listing data for other commercial purposes such as soliciting new clients, contacting expired listings, or recruiting.

Similar laws may apply outside of the United States, including, but not limited to the CAN-SPAM Act, by way of example.

Avoid Fines from Violating the Telephone Consumer Protection Act (TCPA)

Why the TCPA matters to you:



You will be **personally liable** for any violations of the TCPA.



Fines can be as much as **\$500 per call or text**, and add up quickly.

Before making your next call or text:



DO NOT use an automated platform vendor to call or text potential customers.

DO NOT leave pre-recorded messages.



Check phone numbers against Do Not Call Lists prior to making any calls or texting.



Get prior written consent before calling or texting a number on the **Do Not Call Lists**.

TCPA Myths Dispelled

Myth 1:

"The TCPA applies to calls, not texts."

NOT TRUE. *The TCPA covers both calls and texts.*

Myth 2:

"I checked the Do Not Call (DNC) Lists when I got the number; I'm covered."

NOT TRUE. *Numbers are added to the DNC Lists all the time. If you haven't recently checked the number against the DNC Lists, you must do so before calling or texting.*

Myth 3:

"A friend gave me this person's number, so I don't need to check the DNC Lists."

NOT TRUE. *If the person you are going to call or text did not give you the number, you must check the DNC Lists.*





**COLDWELL
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THE REAL ESTATE BRAND THAT SHINES LIKE NO OTHER

