

Up and Running

ANALYSIS AND TASK LIST

AGENT NAME _____

AGENT WEBSITE _____

REVIEWED WITH _____

MARKETING PREPARATION		PROSPECTING ACTIONS	
	TASK		TASK
<input type="checkbox"/>	Upload headshot to RSource Center	<input type="checkbox"/>	Input your bio to Testimonial tree
<input type="checkbox"/>	Create my Real Estate Resume- Use MADI Design Template	<input type="checkbox"/>	Write your personal bio- Use Agent Help Site template. Then Input your bio to your Resource Center Profile.
<input type="checkbox"/>	Create My Experienced Team Flyer in MADI (use Agent Help Site for imagery)	<input type="checkbox"/>	Turn on Birthday Smart Campaign per contact, Enter B-day's in Smart CRM (Use Facebook to find them)
<input type="checkbox"/>	Create a Facebook business page (Directions on Agent Help Site)	<input type="checkbox"/>	Turn on Home Anniversary Smart Campaign per contact, enter as they close or find out sold date in MLS
<input type="checkbox"/>	Review Ninja FLOW (emails to Database) Calendar and keep it visible	<input type="checkbox"/>	*Do NOT change the email address listed in our systems. Changing email address can break all automation.
<input type="checkbox"/>	Complete the 10 Day CRM System Challenge to grow your Database	<input type="checkbox"/>	Send 2 homeowners in your Smart CRM a home valuation email (need email and address)
<input type="checkbox"/>	Begin using Daily Prospecting Task List to help you make money in Real Estate	<input type="checkbox"/>	Join a networking group that meets monthly
<input type="checkbox"/>	Call everyone in database every 90 days to stay in touch	<input type="checkbox"/>	Perform a "test" listing presentation on 2 people in your database
<input type="checkbox"/>	Send handwritten notes/ FB messages to database to announce you're with BHHS	<input type="checkbox"/>	Start the 8x8 Farming a Neighborhood System- Use #FarmingNeighborhood in Smart CRM & the Agent Help Site
<input type="checkbox"/>	Send 2 notes to your database Mon-Fri each day all year	<input type="checkbox"/>	Share your agent website "Home Value Page" on Social Media to get seller leads
<input type="checkbox"/>	Add 1 new name to your database EVERY DAY	<input type="checkbox"/>	Begin scheduling weekly Open House opportunities
<input type="checkbox"/>	Schedule 1-2 annual Real Estate Reviews per week with your database	<input type="checkbox"/>	Do 3 income producing activities every day- You have a license, so use it wisely.

**BERKSHIRE
HATHAWAY**
HOMESERVICES

FLORIDA
PROPERTIES
GROUP

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PROFESSIONAL DEVELOPMENT

TASK	TASK
<input type="checkbox"/> Complete the Digital Assessment with your Agent Ambassador	<input type="checkbox"/> Watch 1 MP Series Video per week on Generating Listing Opportunities on Agent Help Site
<input type="checkbox"/> Print and complete the 1 page business plan with your MP so you have a weekly contact goal	<input type="checkbox"/> Run your business like a business- set your in-office hours and stick to them
<input type="checkbox"/> Schedule your coaching time with your MP (bi-weekly or monthly)	<input type="checkbox"/> Block time to attend any office and company trainings and meetings
<input type="checkbox"/> Sign up for your post license or CE courses through The CE Shop on Cab Corner	<input type="checkbox"/> Complete your onboarding and required courses with MLS and register for your eKey
<input type="checkbox"/> Review 1 Asset Showcase per week on Agent Help Site	<input type="checkbox"/> Call your CORE Service partners for introduction and relationship building

OPERATIONAL ENHANCEMENTS

TASK	TASK
<input type="checkbox"/> Compile Database in kvCORE (use phone, email and 100 people from your sphere of influence) OR if you have a list, ask kvCORE team to import for you	<input type="checkbox"/> Join the BHHS FLPG Facebook group and Follow the main page (click see first) for good promotional posts
<input type="checkbox"/> Change my Voicemail- include full name of Brokerage: Berkshire Hathaway HomeServices Florida Properties Group	<input type="checkbox"/> Review the Brand Promises- Then take the pledge
<input type="checkbox"/> Add email Signature- in phone, email and kvCORE settings section (Sample on Agent Help Site or HTML option in MADI)	<input type="checkbox"/> Review National Brand Guidelines, marketing materials and where to find logos (Agent Help Site)
<input checked="" type="checkbox"/> Turn on Ninja FLOW Smart Campaign	<input type="checkbox"/> Review Luxury Guidelines and marketing materials
<input type="checkbox"/> Pick a Farming Neighborhood	<input type="checkbox"/> Review Buyer and Sellers Guides for presentation (Spanish versions available)
<input type="checkbox"/>	<input type="checkbox"/> Review the Buyer and Seller Marketing Protocol Checklists

UPHOLD THE BRAND PROMISES

TASK	TASK
<input type="checkbox"/> Enter Buyer and Seller info into Database after each closing. Title Co. will share info	<input type="checkbox"/> Send Buyers home valuation email 30 days after closing on their new home in Smart CRM
<input type="checkbox"/> Enter birthdays and Homeiversary of each customer in Smart CRM	<input type="checkbox"/> Schedule quarterly follow-up reminders for all past customers

Digital Assessment and Strategy

AGENT NAME _____ DATE _____

AGENT WEBSITE _____

REVIEWED WITH _____

MY PROFILE (BHHS RESOURCE CENTER)

RECOMMENDATION			
<input type="checkbox"/>	Update Professional Photo	<input type="checkbox"/>	Update Social Media Links
<input type="checkbox"/>	Update Bio	<input type="checkbox"/>	Verify Contact Information
<input type="checkbox"/>	Verify MLS ID is present and correct	<input type="checkbox"/>	Add Languages and Designations

FACEBOOK (PERSONAL)

RECOMMENDATION			
<input type="checkbox"/>	Add @BHHSFloridaPropertiesGroup as place of work	<input type="checkbox"/>	Use the Social Media System (on agent help site)
<input type="checkbox"/>	Update Profile picture	<input type="checkbox"/>	Update Cover Photo
<input type="checkbox"/>	Use Facebook Messenger for FORD conversations	<input type="checkbox"/>	Reply to all comments

FACEBOOK INSTAGRAM (BUSINESS)

RECOMMENDATION			
<input type="checkbox"/>	Create your business page	<input type="checkbox"/>	Use the Social Media System (on agent help site)
<input type="checkbox"/>	Update Profile Photo	<input type="checkbox"/>	Share Announcement Graphic (MADI)
<input type="checkbox"/>	Add company branding to About section	<input type="checkbox"/>	Post Listings (share from your website or use MPLs autopost feature in CORE Listing Machine)
<input type="checkbox"/>	Add a branded cover photo (MADI)	<input type="checkbox"/>	Invite friends and family to follow

INSTAGRAM

RECOMMENDATION			
<input type="checkbox"/>	Tag @BHHSFloridaPropertiesGroup in posts & Add to your bio	<input type="checkbox"/>	Share testimonial graphics
<input type="checkbox"/>	Share Announcement Graphic (MADI)	<input type="checkbox"/>	Update Profile Photo
<input type="checkbox"/>	Use the Social Media System (on agent help site)	<input type="checkbox"/>	Create in MADI and share social post image of listings
<input type="checkbox"/>	Share stories of local events/places	<input type="checkbox"/>	Invite friends and family to follow

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	RECOMMENDATION	
LINKEDIN	<input type="checkbox"/> Update profile photo	<input type="checkbox"/> Share Company Updates and blogs for content
	<input type="checkbox"/> Add Berkshire Hathaway HomeServices Florida Properties Group as place of work	<input type="checkbox"/> Follow coworkers and other professionals
	<input type="checkbox"/> Update personal bio (make it authentic)	<input type="checkbox"/> Post Listings (share from your website or use MPLs autopost feature in CORE Listing Machine)
	<input type="checkbox"/> Share Announcement Graphic (MADI)	<input type="checkbox"/> Add a branded cover photo (MADI)
TESTIMONIAL TREE	<input type="checkbox"/> Share testimonials received on all platforms above	<input type="checkbox"/> Send testimonial requests to all customers
GOOGLE MY BUSINESS	<input type="checkbox"/> Create a Google Business Page with your address (switch the address display setting)	<input type="checkbox"/> Add photos (promo, testimonials, etc)
	<input type="checkbox"/> Add contact Information and website	<input type="checkbox"/> Update Profile Photo