

Up and Running

ANALYSIS AND TASK LIST

AGENT NAME _____

AGENT WEBSITE _____

REVIEWED WITH _____

MARKETING PREPARATION		TASK		TASK	
	<input type="checkbox"/>	Upload headshot to REsource Center	<input type="checkbox"/>	Review Ninja FLOW (emails to Database) Calendar and keep it visible	
	<input type="checkbox"/>	Create my Real Estate Resume- Use MADI Design Template	<input type="checkbox"/>	Input your bio to Testimonial tree	
	<input type="checkbox"/>	Create My Experienced Team Flyer in MADI (use Agent Help Site for imagery)	<input type="checkbox"/>	Write your personal bio- Use Agent Help Site template. Then send copy to your admin and Input your bio to your Resource Center Profile.	
	<input type="checkbox"/>	Create a Facebook business page (Directions on Agent Help Site)	<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 LinkedIn account (if you don't already have one)	<input type="checkbox"/>	*Do NOT change the email address listed in our systems. Changing email address can break all automation.	
PROSPECTING ACTIONS		TASK		TASK	
	<input type="checkbox"/>	Complete the 10 Day CRM System Challenge to grow your Database	<input type="checkbox"/>	Add 1 new name to your database EVERY DAY	
	<input type="checkbox"/>	Begin Commercial 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/LinkedIn/FB messages to database to announce you're with BHHS	<input type="checkbox"/>	Schedule 1-2 annual Real Estate Reviews per week with your database	
	<input type="checkbox"/>	Send 2 notes to your database Mon-Fri each day all year	<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"/> Run your business like a business- set your in-office hours and stick to them
<input type="checkbox"/> Print and complete the 1 page business plan with your Division Director so you have a weekly contact goal	<input type="checkbox"/> Block time to attend any office and company trainings and meetings
<input type="checkbox"/> Schedule your coaching time with your Division Director (bi-weekly or monthly)	<input type="checkbox"/> Complete your onboarding and required courses with MLS and register for your eKey
<input type="checkbox"/> Sign up for your post license or CE courses through The CE Shop on Cab Corner	<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 private Facebook group and Follow the main page (click see first) for good social media posts to share
<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"/> Pick a Farming Area/Zip Code per your Specialty

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"/> Schedule quarterly follow-up reminders for all past customers
<input type="checkbox"/> Enter birthdays of each customer in Smart CRM	<input type="checkbox"/>

