

# Agent Action Plan



**REMAX<sup>®</sup>**

## Weekly Task:

**Watch RE/MAX 101:** During this session you'll learn about:

- **The RE/MAX Technology Suite**
- **Brand and Marketing**
- **Residential, Luxury and Commercial**
- **Marketing Tools**
- **Education**
- **Industry and Community Involvement**
- **Events and Networking**
- **Trademark and Brand Protection**
- **Professional Awards**

**Start Now >**



## Goals:

- Establish a routine
- Build foundational knowledge
- Start generating leads

## Weekly Accountability:

- Accountability:
  - Use the 5-5-4-2 Daily for daily Tasks
- CRM:
  - Upload all contacts into your CRM (MAXTECH)
- MAXTECH:
  - Download the CRM Mobile App if you haven't already
  - Edit Profile, add signature
- MAXCENTER:
  - Complete your Profile, adding photo, Bio, Social, service areas, etc.

## Tasks:

- Develop a daily schedule and stick to it.
- Find schedule for local board classes, sign up for all contract, MLS, and other Classes.



## **Weekly Task:**

### **Complete the Agent Quick Start Guide**

**Get a jump start on MAXTECH Powered by BoldTrail with this Quick Start course! You'll learn how to set up a powerful profile, optimize your system settings to generate and convert more leads for you, and get insider daily best practices for growing your business.**

**Start Now >**

**Course curriculum**

**Time to complete: 1 hour 20 mins**



### Goals:

- Improve follow-up processes

### Weekly Accountability:

- Accountability:
  - Use the 5-5-4-2 Daily for daily Tasks
- Follow-Ups:
  - Maintain follow-up within 24 hours and start tracking follow-up attempts in the CRM.
- Appointments:
  - Schedule at least 3-4 appointments per week.

### Tasks:

- Create a social media plan and post regularly about real estate topics.
- Host at least two open houses this month.
- Start working on marketing materials (flyers, business cards).
- Develop a script for cold calls and practice regularly.

### Goals:

- Expand market presence
- Strengthen client relationships

### Weekly Accountability:

- Accountability:
  - Use the 5-5-4-2 Daily for daily Tasks
- Texts:
  - Send 15 follow-up texts per day.
- Follow-Ups:
  - Continue immediate follow-ups and start a drip campaign for long-term leads.
- Appointments:
  - Aim for 4-5 appointments per week.

### Tasks:

- Analyze and review current strategies with your coach and adjust as needed.
- Create and send out a monthly newsletter to your SOI.
- Request testimonials from satisfied clients to build credibility.
- Attend additional training sessions or workshops to enhance skills.

# Ongoing Activity



## Ongoing Accountability:

- **Weekly Review:**
  - **Conduct a weekly review of your performance, focusing on the number of calls, texts, follow-ups, and appointments.**
  - **Set new weekly goals based on previous performance and coaching feedback.**
- **Monthly Review:**
  - **Meet with your Coach / Broker / Trainer for a monthly review to assess overall progress, celebrate successes, and identify areas for improvement.**
- **Adjustments:**
  - **Be prepared to adjust your strategies based on feedback and results. Flexibility is key to adapting to the ever-changing real estate market.**



# 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."**