

Marketing Kickoff Check List

Please complete the following information and send back to your Key Assistant along with the files needed. When completing this form please complete it in the style you'd like it to appear on your materials. For example: Do you like your phone style to be: XXX-XXX-XXXX or (XXX) XXX-XXXX or XXX.XXX.XXXX. If you do not have a standard style, please let us know and we can discuss on the Marketing Kick Off Call.

You may skip the sections you do not have or are not applicable to you and your business.

1. First Name: _____
2. Last Name: _____
3. Company/Team Name: _____
4. Brokerage: _____
5. Company Address:
Street: _____
City: _____ State: _____ Zip: _____
6. Brokerage Address:
Street: _____
City: _____ State: _____ Zip: _____
7. Company Phone #: _____
8. Brokerage Phone #: _____
9. Cell Phone #: _____
10. Fax #: _____
11. Email Address(s): _____

12. Signature Line – Please provide your signature line as you’d like it to appear in emails:

13. Phone #(s) You’d like on Your Marketing Materials. Many agents put office and cell phone:

14. Tagline/Slogan - Provide any taglines or slogans for your business:

15. Colors and Fonts, you use for your Marketing Materials (Please provide Color Code if you use specific colors):

16. High Resolution Images – These are large images that are a minimum of 300dpi which are used for print. This prevents them from losing image details when printing.:

- a. Professional Head Shot or Team Image
- b. Realtor Logos:
 - i. Business logo (ex: the logo you use on your personal website)
 - ii. Brokerage logo (ex: Remax or Coldwell Banker logo with your name on it)
 - iii. Logos with a transparent background
 - iv. Any other logos that need to be included on marketing material
- c. Realtor Designation Logos:
 - i. Any designations you use for your marketing materials such as SRES, CDPE, etc.

17. Examples: If you have a very specific vision of what you would like for postcards and newsletters, please include examples of ones you like. These do not have to be your own, or they could even be a scan of something you have used in the past. They give us an idea of the styles you like.

18. Listing Marketing – Who is completing your Marketing for Listings?

What CORE Marketing work do you currently complete?

1. Weekly Online Marketing - Common weekly online marketing would be updating online platforms – such as Facebook, Yelp, Zillow, etc, blogging and social media posts.

- Do you blog and what platform do you post on?

- If yes, who is currently doing your blogging work?

- Do you complete weekly online social media posts, if yes, where do you post?

- Who is currently doing your social media posts?

- Do you prefer any particular day of the week for posts?

- What topics (examples: buyer information, seller information, credit and financial information and interior décor information, just sold, just listed)? Will we link to curated content? If we blog for you, we can also promote the blog posts via your social media.

2. Monthly Email Newsletter

- Do you send monthly email newsletters and through what platform?

- If yes, who is currently doing this for you?

- Do you prefer a particular date of the month?

- In what database do you currently house the list that the email newsletter is to go to?

- What contact type/s will email newsletter go to? We typically send to Client/SOI/Buyer/Seller and New Lead A/B/C.

3. Monthly Mailed Postcard

- Do you currently send out mailed postcards? How often?

- If yes, who creates these for you?

- What printer/platform used? We recommend Express Copy unless you have another preference.

- What database is list/s for post cards stored in?

- What list/s do you want to send to (Seller, Buyer, SOI, all or other)?

Advanced Marketing

Are you marketing to any of the following groups? If yes, how are you marketing to them?

- Client Marketing:

- Buyer Marketing:

- Seller Marketing:

- Other Marketing:

Are there any other marketing tasks we might help you with at this time?

Marketing Goals

We've found that many agents get overwhelmed with starting too many marketing tasks at once. It's best to start with 3 goals to achieve within marketing for the first month, and then expand upon that. An example would be: Fixing Zillow page and Facebook page, Monthly Email Newsletter and Monthly Mailed Postcard.

What are the top 3 marketing-related goals you have with Best Agent Business?

1.

2.

3.
