Real estate promo planner

A 90-day plan to start a branded merchandise program that brings in listings.

Agent _____ **Agency** _____

Start date _____ **Annual budget $** _____

Weeks 1 and 2: database and budget

- [ ] Export your CRM and check every past client has a current address, phone, email and settlement date
- [ ] Tag everyone who has referred business to you
- [ ] Add open home attendees from the last six months who agreed to be contacted
- [ ] Set an amount per settlement and an annual amount for other touchpoints
- [ ] Check your agency or franchise brand guidelines and approved suppliers

Weeks 3 and 4: items and first order

- [ ] Pick three touchpoints to start (suggested: settlement, open homes, sale anniversary)
- [ ] Choose one item for each touchpoint
- [ ] Ask for samples and check quality
- [ ] Approve proofs: name, phone, agency logo, licensee name, colours
- [ ] Order about three months of stock plus a small buffer
- [ ] Write a short note to go with each item

Month 2: launch

- [ ] Hand over settlement gifts in person where you can
- [ ] Ask permission before sharing photos with clients
- [ ] Give open home items to people who leave their details
- [ ] Follow up open home attendees within two days and mention the item
- [ ] Record every gift in your CRM with the date and item

Month 3: community and review

- [ ] Choose one local activity to support for a full season
- [ ] Add a lead source field to every appraisal booking
- [ ] Count items given, follow-up conversations and appraisals
- [ ] Decide which touchpoint to add next
- [ ] Book your end-of-year calendar order

Your first three touchpoints

1. Touchpoint _____ **Item** _____ **Budget $** _____

2. Touchpoint _____ **Item** _____ **Budget $** _____

3. Touchpoint _____ **Item** _____ **Budget $** _____

Settlement gift checklist

- [ ] Gift ordered at least two weeks before settlement
- [ ] Card written by hand and signed
- [ ] New address or family name engraved, if personalising
- [ ] Licensee name and your contact details on the item or card
- [ ] Handed over at key collection or in the first week
- [ ] Photo taken, with permission to share
- [ ] Gift and date recorded in your CRM
- [ ] Anniversary reminder set for 12 months' time

General guidance only. Check advertising, privacy and Spam Act obligations with your agency's licensee.

12-month touchpoint calendar

Suggested activities for each month. Add your sale anniversaries and local events.

January

- Sale anniversary calls and gifts
- Summer open homes: drink bottles, hats

Anniversaries and events:

February

- Back to school: plan sport sponsorships
- Review last year's lead sources

Anniversaries and events:

March

- Autumn listings: refresh appraisal packs
- Quarterly review of spend and appraisals

Anniversaries and events:

April

- Restock umbrellas before wetter months
- Easter: small gift for top clients

Anniversaries and events:

May

- Check stock of settlement gifts
- Winter sport season sponsorship

Anniversaries and events:

June

- End of financial year referral thank-yous
- Quarterly review

Anniversaries and events:

July

- Winter open homes: umbrellas
- Plan your spring campaign

Anniversaries and events:

August

- Order open home stock for spring
- Refresh signboard and launch items

Anniversaries and events:

September

- Spring selling season starts
- Quarterly review

Anniversaries and events:

October

- Order calendars and Christmas gifts
- Summer sport sponsorship

Anniversaries and events:

November

- Approve calendar proofs
- Plan December deliveries and drop-offs

Anniversaries and events:

December

- Deliver calendars in the first week
- Christmas gifts for top clients and referrers

Anniversaries and events:

General guidance only. Check advertising, privacy and Spam Act obligations with your agency's licensee.

Budget and results tracker

Fill in the budget at the start of the year and the results each quarter.

Touchpoint	Item	Qty	$ each	Total $	Given	Appraisals	Listings	$ per appraisal
Appraisal or listing								
Campaign launch								
Open homes								
Settlement								
Sale anniversary								
End of year								
Local events								
Referral thank-you								
Total								

Quarterly review

Which touchpoint brought in the most appraisals for the money?

Which items are clients still using when you visit?

Which touchpoint will you add, change or drop next quarter?

Who referred business this quarter, and have you thanked them?

Crest Promos supplies branded merchandise and gifts for real estate agencies across Australia, with free digital proofs. crestpromos.com.au

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