  **Top 50 Touch Monthly Initiative Strategies**

 **Terri Murphy & Mike White**

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| **Month** | **Activity 1** | **Activity 2** | **Addl Options** |
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| **January**  | Initial Call – Happy New Year – Updating my contact list – Catch up = F.O.R.D. or Apology Offer a comp Annual Mortgage Fitness Review with agent lender partner  | Send a personal thank you note with coupon for Annual Fitness Review (brand lender partner) and Home Valuation Report Update Follow up with a call in 30-45 days to pull the offer (urgency)  | Option: record b’day or new family event in calendar and follow up on their b’day  |
|  |  |  | ***NOTE: ALWAYS INCLUDE PICS/VIDEOS< ETC in Facebook and online channels-***  |
| **February**  | TOUCH - Valentine Promotion – Card with a discount at the local bakery/cookie place We love referrals- how can we help?  | We value your opinion and would be honored to serve anyone you refer us to- NOTE  | Contact local bakery or cookie group and get cookies with your logo on them for bigger branding  |
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| **March**  | Call – Interview for 9/10’s Recommendation Survey to compile a list of the top local vendor services in the area based on the recommendation of your top 50 group  | Send an intro letter to 9/10 referral from contact to their recommended biz service partner to set up short call/meeting – cc the referring contact  | Host a short wine/cheese meet event Identify WINE sponsors for tastings;-) |
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| **April**  | Call/Touch: Offer an ID Theft Review by Lender Partner – Tax time – ID Theft high | Lender provides an FAQ report/video/etc. and offers a no-obligation ID Theft Screening – no cost Agent sets up the meeting  |  |
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| **May** | Spring Breakfast Club Date  | Arrange at for invites to 10 of your top 50 at a time for a Saturday breakfast get together at a local restaurant – usually 40% show up- Repeat thru the year to rotate thru balance of Top 50 if they are local – if not – send them breakfast (online services) if they can’t make it – (Starbucks Gift card works too with a letter/note – sorry you missed breakfast, but have one on me/us)  | Panera Bread is a great resource here – they have a separate room and or a local breakfast restaurant – Decorate the tables with some premium or fun give away for high visibility in the restaurant  |
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| **June** | Face to Face - Summer Kickoff – Door Drop – Summer Bucket of fun – Sun block – Beach toys – Sippee Cup – sunglasses from Dollar Tree  | Pick up at office or drop off at door – gotta see them at mid-year  | Go to Dollar TREE store- everything is only $1 and you can buy a colorful plastic bucket and include sand toys, water pistols, etc very economically  |
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| **July** | Flag Plant on their lawn – with donation made in their name to the local Veterans group/hospital/  | If condo - Or Sponsor a Fourth of July PET Parade – coordinate with local pet adoption group events – have a contest and get online voting – get pet sponsors to offer small donations for prizes – best outfit, coolest look- ugliest dog – smallest dog – biggest dot  | Order flags in April/May – get a video to document the activity with your real estate team on the street Yup- lots a pictures and videos for Pinterest, Instagram and Biz FB Page – Include in Newsletter if applicable  |
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| **August**  | Dog Days of Summer – send their pet a small gift – if no pet – send their kids a back to school small package – ORRent a theatre – and supply popcorn to get out of the heat☺  | Include a call to action – getting close to end of year – looking for someone who wants to be your neighbor – School Kit: Pencils, Highlighters, small note pads Send invites-Top 50- Only – with their families and perhaps 1 new referral partner – Address the group before the movie – thank them for their referrals and support ;-) - Can sponsor with lender partner(s)  |  |
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| **Sept** | Annual Client Appreciation EventInvite Top 50 – Wine & Cheese, Local Park Picnic,Restaurant partner private room – wine/cheese/munchies Your home if applicable  | Sponsor with lender partner and local restaurant or catering serviceHire a photographer to take pics- post on Facebook as an event Park Permit – or Restaurant Off day – Sunday afternoon, etc. – post pics on Facebook and Instagram/Pinterest  |  |
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| **October** | Halloween Promotion to Top 50 Don’t be scared – we’ll handle your referrals right!Or plan a FALL promotion - Secure a Discount coupon from your HVAC partner for HVAC Fall Tune-up – Call and send  | Co-branded by Realtor/(and/or Lender) with HVAC partner with a coupon of some value to get tuned up for winter – clean filters, etc.  |  |
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| **November** | In Person –PIE Promotion – Top 50 get first crack at apple or pumpkin – do with lender partner to cut costs – Avg: $10 per pie or $5 each – Put branded sticker on box- must pick up at your office – brand both – lender and agent – and any source of referees to the pie program and past clients, etc. I would do Thanksgiving vs Xmas and combine the two – using one of the “options” as the 12th personal touch – (to avoid Holiday Religious issues conflicts etc.) but have a benefit to the pie program -  | Include any referral contact that top 50 referred -  |  |
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| **December** | Charity/Community effort – Donation in their name to their charity Call and get the name of their charity and make a small donation or offer the one you are sponsoring Vets, Pets, Kids, Seniors, Food Bank, etc.  | Food Bank Drop off at your officeOR Agent pickup  | Contact Toys for Tots for a free box and posters  |
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| **Other Options** | Birthday – Agent’s or theirs – Agent can hold a b’day bash and invite Top 50 and promote a local charity contribution Anniversary of house or marriage Promotion – Job First Grandkid – baby gift Kid Wedding - Retirement  |  |  |