 **Weekly Prospecting & Project Plan** 

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| **Day** | **Prospecting** | **Action** | **Planning** | **Categories** |
| **Mon.** |  |  |  |  |
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| **Tue** |  |  |  |  |
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| **Wed** |  |  |  |  |
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| **Thurs** |  |  |  |  |
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| **Fri** |  |  |  |  |
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| **Sat** |  |  |  |  |
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| **Sun** |  |  |  |  |
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| **Mon** |  |  |  |  |
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**Categories:**

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| **Prospecting** | **Planning** | **Plugged in Calendar** |
| Top 50 | Every week- Call 1 a day for 5 Days  1 to lunch every week or other week | 1 a day + 1 lunch? |
| Market Update Farm/flyer | 1 x per month –  Week 2nd week –  Prepare and print 1st week | Send out 2nd week |
| Contacting B Leads | Identify the 1st and 3rd week | 1st and 3rd week |
| Contacting C Leads/SOI | Schedule for the 4th week | 4th week |
| **10/10/20’s** | Check new listings in areas you want to target and deploy a quick Help Us Pick Your New Neighbor and do 10/10/20 around the new listing or new sale in any area | Deploy around any new listing that you want to target or newly closed listing |
| Open Houses | Check on Monday for new listings in farm or area you want to target – plan it backwards from the open house date:   * Post the event on Facebook * Post on the Company Facebook * Post on Twitter * Deliver the Exclusive SNEAK PEEK invitations for the immediate neighbors if your listing otherwise… * 10/10/20 around the new listing | Identify every Monday or Sunday night every week/weekly |
| 9’s & 10’s Script for Strat Referrals | Call your SOI/Database and start building your top 10 list of service vendors in your area | Follow up quarterly and schedule a phone/meeting with those vendors/services that have been receiving your referrals – if none after 12 months – replace with another vendor |
| Annual/Quarterly Event | November – Pie Promotion at Thanksgiving  Look for bakery or big box store to buy pies – can coordinate with lender for cost sharing  Make labels –  Send invitations to identify pie choice: apple or pumpkin by Nov. 3rd  Set up pickup for date in November for pickup at your office or at a place that works for you – they HAVE to pick it up☺ - 1 per family | 1st week of October |
| Contacting Orphaned Office Files for agents that have left the biz |  |  |
| FSBO- REDX | Check every Sunday night/Monday morning | Share with lender every Monday or Friday as noted |
| Research Expired Listings from 1 year back | Use TheRedX.com | Share with lender every Monday or Friday as noted |
| Lunch & Learn/Short learning events with Lender Partner | Set up a quarterly lunch & learn or a small meeting at the local chamber, church, school, etc. For credit repair, estate, First time buyers/sellers, etc. | Actions: Look for an easy, convenient venue for a bring in lunch or evening meeting to host the venue – share costs |
| House Warming for newly closed in Farm area | Identify newly closed properties every 2 weeks in your target area – contact and ask if the new homeowner has interest in a small meet your neighbors event hosted by you and your lender partners | Contact lender weekly or bi-weekly with new closings – send letter, pop by – drop off etc. |
| IVR Follow up from office leads | Confer with Lender partner to clarify follow up on Interactive Voice Response System leads from signs, marketing, flyers, web, etc. |  |
| Co-sponsor event with local Insurance/lender/estate/credit etc. | Holiday events or charitable events in any quarter – identify early in the year for buy in and time blocking |  |
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| Contact local vendors:  Wine companies  New Bakery  New restaurants looking to get targeted area connections | Tie to farming – strip malls nearby –they have cluster of biz – small coffee shops  Yard Art/Camera/Jewelry – Grouping –  Salon/Massage/2 nail salons-  Day at the Spa –   * Ask them if they want to be leveraged into your d/b- farm area and be a sponsor in your Market update – include a 10% discount coupon on their services coded to the agent * Getting new clients – from your farm – they pay for a portion of the printing and delivery/ mailing/distribution of market update – get a commitment for more than 1 month - * Option: Leverage a different vendor every month during the year- 12 different vendors for each month going forward – make them good for 30 days or more- ask the vendor what they are willing to do to offer engagement to your d/b, farm, SOI * If the vendor is a restaurant – we want to show fast results – Maybe offer a “two for 1” dinner on their slowest night |  |
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| **OTHER:** |  |  |
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