



Annual Marketing Plan

Please plan your marketing with your Advisor. Check all items you would like to include in your marketing plan.

- Monthly marketing items will be sent to agent's complete SOI database.
- Evidence of Success (EOS) is sent once per month if applicable. It consists of all the properties currently listed and/or sold in the previous month.
- December Holiday Card can take the place of a marketing postcard for December marketing if agent chooses.
- When an agent has an event the event marketing can replace the current months marketing
- Anything outside of the marketing plan requested by the agent to the agent's Marketing Coordinator is considered an exception request. Exception requests must be approved by the agent's Advisor and Fusion's Operations Manager. Please allow up to 3 business days for the request to be considered.

Current postcard options. If you would like to substitute a postcard for an alternative postcard, please choose from the list below and write your selection in the notes field for that month.

1. Best for the Job
2. Pricing Options
3. So Much More
4. Professionalism Matters
5. Not Reality TV
6. Client Testimonials
7. The Stakes are High

Current letter options. If you would like to substitute a letter for an alternative letter, please choose from the list below and write your selection in the notes field for that month.

1. Hire the Best
2. Pricing Options
3. Marketing Frequency
4. CMA Offer
5. Who You Hire

For your Market Statistics Email we can do up to 3 cities. Please fill in your selections below.

City 1

City 2

City 3

Month 1

Story Letter

Resume

Email Option

Market Statistics

"One Cool Thing"

Notes:

Month 2

Postcard - Apply for the Job

Email Option

Market Statistics

"One Cool Thing"

EOS - Just Sold

Notes:

Month 3

Letter - Hire the Best

Email Option

Market Statistics

"One Cool Thing"

EOS - Just Sold

Notes:

Month 4

Post card - Pricing Options

Email Option

Market Statistics

"One Cool Thing"

EOS - Just Sold

Notes:

Month 5

Letter - Market Frequency

Email Option

Market Statistics

"One Cool Thing"

EOS - Just Sold

Notes:

Month 6

Postcard - So Much More

Email Option

Market Statistics

"One Cool Thing"

EOS - Just Sold

Notes:

Month 7

Letter - CMA Offer

Email Option

Market Statistics

"One Cool Thing"

EOS - Just Sold

Notes:

Month 8

Postcard - Not Reality TV

Email Option

Market Statistics

"One Cool Thing"

EOS - Just Sold

Notes:

Month 9

Postcard - Client Testimonials

Email Option

Market Statistics

"One Cool Thing"

EOS - Just Sold

Notes:

Month 10

Letter - Who You Hire

Email Option

Market Statistics

"One Cool Thing"

EOS - Just Sold

Notes:

Month 11

Postcard -Professionalism Matters

Email Option

Market Statistics

"One Cool Thing"

EOS - Just Sold

Notes:

Month 12

Postcard - Stakes Are High

Email Option

Market Statistics

"One Cool Thing"

EOS - Just Sold

Notes:

December Holiday Card Options

- Christmas
- Happy Holidays
- Other

Notes:

Terms and Conditions: I have read through the guidelines and marketing options. I approve all the Marketing selections indicated above.

I agree

Date

Agent Name

Advisor

Marketing
Coordinator

Thank you! Once your database is in the Back Office, we will put your Marketing Plan into effect and begin marketing to your Sphere of Influence! Congratulations!