

The Past Client Plan

OVERVIEW

2 Calls a year

- Anniversary Call
- Letter of the week call

Email every month

- 6 months - market update and trends
- 6 months - homeowner value add

Mail every month

- Evidence of Success
- Letter of the heart

2 Events a year

- Winter event
- Summer event

CALLS

Home Anniversary Calls

- All clients get a call from their agent on their home anniversary week
- Automation: FUB populates a to-do to call the client 5 days before their home anniversary

Letter of the week PC call

- All clients get called 1x a year based on the letter of week. Example: Month 1: call all A's and B's, month 2: Cs and D, 2 letters get called every month.
- Create a smart list in FUB, sort by name A-Z,
- Print off the list at the beginning of the month, call weekly

EMAIL

Market Update

- Bi monthly video: alternate months - market trends, want a CMA, what you should know about the market

Value Add

- Bi monthly video: Something a homeowner would appreciate: insurance reminder, refinance time, vendor list, whats going on in Clarksville

MAIL

- Evidence of Success
- Letter of the heart
- Examples:
- [Past 10 EOS](#)
- [Past 5 LOTH](#)

EVENTS

Summer Event

Winter Event