

Agent Action Plan



Unstoppable
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Weekly Task:

Watch RE/MAX 101: During this session you'll learn about:

- The RE/MAX Technology Suite
- Brand and Marketing
- Residential, Luxury and Commercial
- Marketing Tools
- Education
- Industry and Community Involvement
- Events and Networking
- Trademark and Brand Protection
- Professional Awards

Start Now >



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MAXTECH

powered by **kvCORE**
P L A T F O R M

Weekly Task:

Complete the Agent Quick Start Guide

Get a jump start on MAXTECH Powered by kvCORE with this Quick Start course! You'll learn how to set up a powerful profile, optimize your system settings to generate and convert more leads for you, and get insider daily best practices for growing your business.

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Course curriculum

Time to complete: 1 hour 20 mins



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Day 1-30: Foundation and Building Momentum

90
DAYS

Goals:

- Establish a routine
- Build foundational knowledge
- Start generating leads

Weekly Accountability:

- Accountability:
 - Use the 5-5-4-2 Daily for daily Tasks
- CRM:
 - Upload all contacts into your CRM (MAXTECH)
- MAXTECH:
 - Download the CRM Mobile App if you haven't already
 - Edit Profile, add signature
- MAXCENTER:
 - Complete your Profile, adding photo, Bio, Social, service areas, etc.

Tasks:

- Develop a daily schedule and stick to it.
- Find schedule for local board classes, sign up for all contract, MLS, Tax Records Classes.



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Goals:

- Improve follow-up processes

Weekly Accountability:

- Accountability:
 - Use the 5-5-4-2 Daily for daily Tasks
- Follow-Ups:
 - Maintain follow-up within 24 hours and start tracking follow-up attempts in the CRM.
- Appointments:
 - Schedule at least 3-4 appointments per week.

Tasks:

- Create a social media plan and post regularly about real estate topics.
- Host at least two open houses this month.
- Start working on marketing materials (flyers, business cards).
- Develop a script for cold calls and practice regularly.



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Goals:

- Expand market presence
- Strengthen client relationships

Weekly Accountability:

- Accountability:
 - Use the 5-5-4-2 Daily for daily Tasks
- Texts:
 - Send 15 follow-up texts per day.
- Follow-Ups:
 - Continue immediate follow-ups and start a drip campaign for long-term leads.
- Appointments:
 - Aim for 4-5 appointments per week.

Tasks:

- Analyze and review current strategies with your coach and adjust as needed.
- Create and send out a monthly newsletter to your SOI.
- Request testimonials from satisfied clients to build credibility.
- Attend additional training sessions or workshops to enhance skills.



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Ongoing Activity

90
DAYS

Ongoing Accountability:

- **Weekly Review:**
 - Conduct a weekly review of your performance, focusing on the number of calls, texts, follow-ups, and appointments.
 - Set new weekly goals based on previous performance and coaching feedback.
- **Monthly Review:**
 - Meet with your Coach / Broker / Trainer for a monthly review to assess overall progress, celebrate successes, and identify areas for improvement.
- **Adjustments:**
 - Be prepared to adjust your strategies based on feedback and results. Flexibility is key to adapting to the ever-changing real estate market.



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5-5-4-2 POWER HOUR



5 CALLS / TXT WITH PAST CLIENTS / CENTER OF INFLUENCE

NAMES	NOTES

5 NEW CONVERSATIONS, NEW CONTACTS

NAMES	NOTES

4 LEAD FOLLOW UP CONVERSATIONS

NAMES	NOTES

2 SOCIAL POSTS, TRY VIDEOS!

PLATFORM	TYPE OF POST

" A GOAL WITHOUT A PLAN IS JUST A WISH."