

*"Small actions,
repeated daily,
create remarkable
results."*

—Anonymous

FROM STRATEGY TO SOLD

Your Second Quarter Success Plan

Action Steps | Market Trends | Goal Worksheets | Marketing Insights

Quarterly Edition - 02



SOLD

“Success in real estate is built with consistency—one day at a time.”

—Anonymous

Second Quarter Goals Worksheet

Identify Your Top Three Goals for this Quarter

My #1 Goal:

e.g., Secure 5 new listings

My #2 Goal:

e.g., Add 20 new contacts to my sphere of influence

My #3 Goal:

e.g., Close 3 buyer transactions

Goal 1 Action Items:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Goal 2 Action Items:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Goal 3 Action Items:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Required Resources:

e.g., Update my CRM, refresh my listing presentation

1. _____
2. _____
3. _____

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e.g., Update my CRM, refresh my listing presentation

1. _____
2. _____
3. _____

Required Resources:

e.g., Update my CRM, refresh my listing presentation

1. _____
2. _____
3. _____

Skills to Develop:

e.g., Improve my social media marketing strategies

1. _____
2. _____
3. _____

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1. _____
2. _____
3. _____

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e.g., Improve my social media marketing strategies

1. _____
2. _____
3. _____



*“The deep roots
never doubt spring
will come.”*

—Marty Rubin

April Market Insights

WHERE PREPARATION MEETS OPPORTUNITY

April is the month when real estate activity becomes visible. Buyers are back in motion, sellers are watching closely, and conversations that started quietly earlier in the year begin to turn serious. This is when the spring market starts to show its true shape, making April less about rushing and more about positioning.

For agents, April is the time to focus on readiness. Homeowners aren't just asking if they should sell — they're asking what their home could realistically command. Pricing strategy, market education, and presentation matter deeply right now. Homes that are thoughtfully prepared and accurately

positioned tend to attract attention early, before competition reaches its peak.

Consistency also plays a powerful role in April. Regular touchpoints — newsletters, market updates, neighborhood postcards, and personal check-ins — build confidence with homeowners who are still deciding. Even those not planning to move immediately are paying attention to who shows up with calm guidance and clear information.

April is also a planning month for agents themselves. Strong habits formed now create breathing room later in the season. Systems, follow-up routines, and marketing schedules put in place in April help prevent missed opportunities in May and burnout in June.

Think of April as the foundation month. Agents who focus on education, visibility, and preparation now are the ones who experience smoother transactions and stronger pipelines as spring unfolds.

April Activities Checklist

April is where progress begins to take shape. Use this checklist as your action plan for the month, focusing on simple, intentional steps that keep your business moving forward. Check off each task as you go and stay aligned with your goals as the spring market begins to grow.

- Review local inventory trends
- Send a spring market update
- Audit listing presentation materials
- Update CMA templates
- Refresh listing photography checklist
- Reconnect with Q1 leads
- Send a homeowner value reminder
- Schedule weekly follow-ups
- Update website or bio
- Post educational content weekly
- Review pricing strategy scripts
- Walk one target neighborhood
- Schedule a monthly holiday campaign
- Organize open house supplies
- Plan May marketing calendar

Some Marketing Ideas for You this Month



Market Update Postcards

[Get Started](#)



Multi-Photo III Postcards

[Get Started](#)



Holidays Automated Postcard Campaign

[Get Started](#)



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*“Action is the
foundational key
to all success.”*

—Pablo Picasso

May Market Insights

THE MARKET AT FULL VOLUME

May is often the emotional center of the spring market. Buyers are motivated, sellers are hopeful, and activity feels constant. With increased demand and more listings entering the market, expectations rise quickly — and so does the need for steady leadership.

This is the month where clarity becomes an agent’s greatest asset. Pricing conversations need to be honest and data-driven, not optimistic guesses. Homes that are priced correctly from the start tend to sell faster and with less friction, while over-pricing can quietly stall momentum during a month when timing matters.

May is also a powerful time to leverage proof of activity. Recent sales, neighborhood trends, testimonials, and success stories reassure homeowners that movement is happening. Sharing real results helps hesitant sellers feel more confident about entering the market.

At the same time, May demands discipline. Busy schedules, multiple conversations, and active listings can pull agents in every direction. Staying organized, protecting follow-up time, and using systems instead of memory keeps opportunities from slipping away.

May rewards agents who balance energy with strategy. When expectations are managed well and communication stays consistent, this month often produces strong closings and future referrals that carry into summer.

May Activities Checklist

May is all about momentum. The groundwork you've laid is starting to show results, and consistent action now can make a powerful difference. Use this checklist to stay focused, follow through, and keep your business moving in the right direction.

- Track showing feedback closely
- Highlight recent sales in marketing
- Send a seller expectations guide
- Call warm homeowner leads
- Share a "what's selling now" update
- Review price reduction strategy
- Schedule listing check-ins
- Post social proof content
- Update active listing descriptions
- Host or plan open houses
- Review buyer objection scripts
- Confirm summer marketing plan
- Send mid-spring newsletter
- Follow up on past CMAs
- Block time for admin cleanup

Some Marketing Ideas for You this Month



Memorial Day Postcards

[Get Started](#)



Just Sold Follow-Up Automated Postcard Campaign

[Get Started](#)



Multi-Photo II Postcards

[Get Started](#)



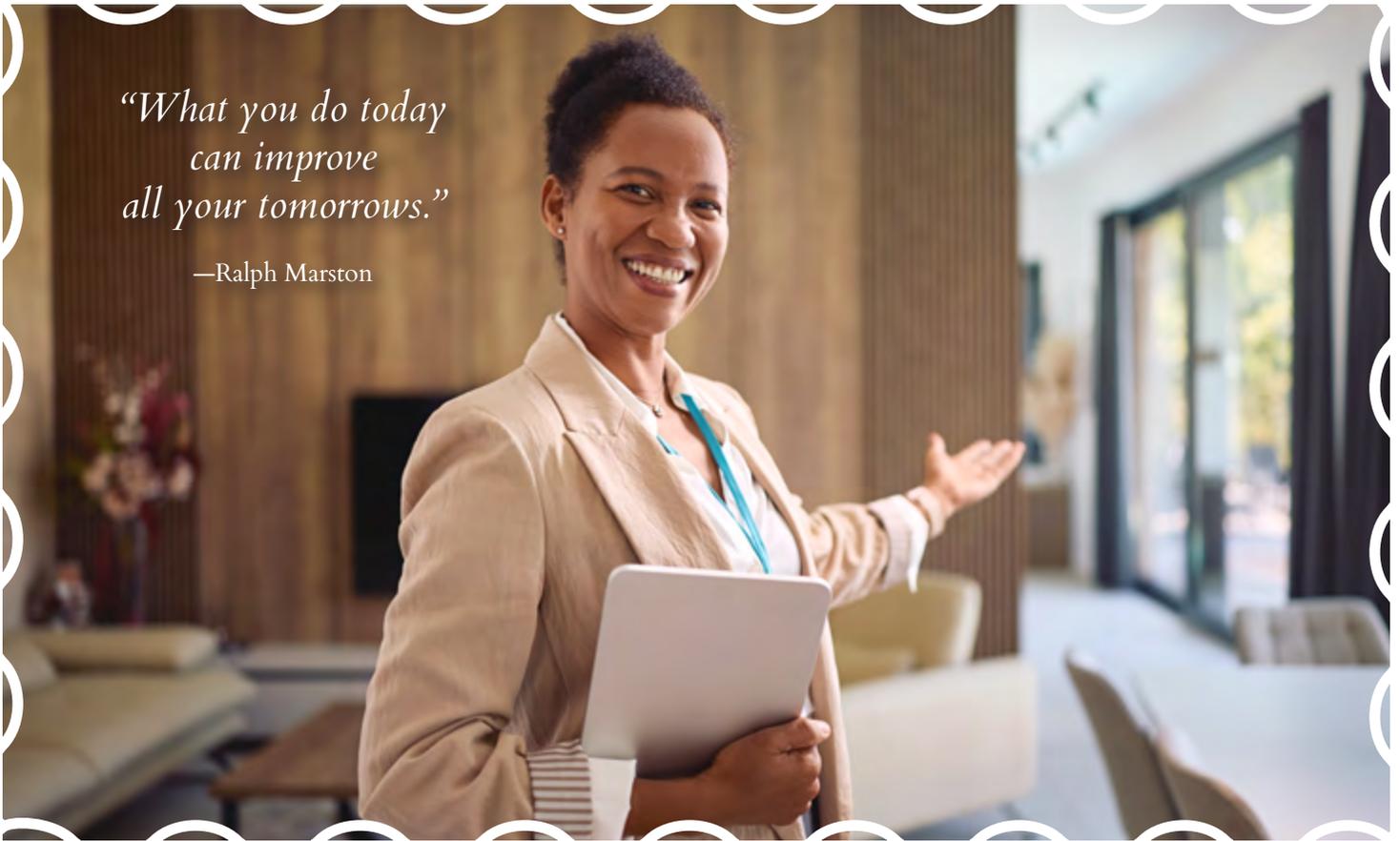
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*“What you do today
can improve
all your tomorrows.”*

—Ralph Marston



June Market Insights

STRATEGIC CONVERSATIONS TAKE THE LEAD

June marks a subtle shift in the market. While buyers remain active, homeowners begin reassessing timing. Some move forward quickly, while others pause and consider later options. This makes June an ideal month for thoughtful follow-up and strategic conversations.

Many of June’s opportunities come from seeds planted earlier in the year. Homeowners who weren’t ready in March or April are often more open to revisiting the conversation now. A simple check-in paired with updated market insight can reopen doors without pressure.

Education becomes especially valuable this month. Explaining how summer markets behave, what timelines look like, and how selling now compares to waiting helps homeowners feel empowered rather than rushed. Agents who guide with information instead of urgency build trust that lasts beyond one transaction.

June is also a smart time to reflect and prepare. Review what has worked so far in Q2, clean up databases, and organize follow-up plans. This sets agents up for a strong second half of the year. This behind-the-scenes work often determines how successful Q3 becomes.

June isn’t about slowing down — it’s about being intentional. Agents who stay present, thoughtful, and proactive during this transition month often find themselves well-positioned when the next wave of opportunity arrives.

June Activities Checklist

June marks the halfway point of the year—a perfect time to stay focused and finish the first half strong. Use this checklist to maintain momentum, nurture opportunities in progress, and set the tone for a successful summer season.

Revisit “not ready” conversations

Send a mid-year market snapshot

Prepare fall seller talking points

Update homeowner mailing lists

Review expired and withdrawn listings

Schedule appreciation touchpoints

Analyze Q2 performance metrics

Refresh follow-up email templates

Plan July/August outreach

Create educational seller content

Review pricing conversations

Call past clients for check-ins

Update testimonials or reviews

Clean up CRM tags

Set Q3 goals

Some Marketing Ideas for You this Month



Summer Postcards

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Local Real Estate Stats Postcards

[Get Started](#)



Animal Series III Automated Postcard Campaign

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“Discipline today
creates opportunity tomorrow.”

—Anonymous

My Achievements and Progress

Second Quarter Review



Number of Goals Achieved



Number of Listings Secured



Number of Closed Transactions



Number of New Leads Generated



Number of Buyer Clients Signed

My Biggest Wins this Quarter:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

My Most Successful Strategies and Actions:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

My Additional Achievements and Milestones:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

My Key Takeaways and Identified Areas for Improvement in Q3:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____



A Scheduled Holiday Campaign

Year-Round Holiday Greetings = Year-Round Listing Activity!

Every holiday is a golden opportunity to connect with your market! Our Holiday Postcard Campaign makes it easy to spread cheer, build goodwill, and pave the way for new business month after month.

Why the Scheduled Holiday Campaign Works:

It's a One-and-Done Marketing Solution

Schedule a campaign in minutes and stay visible throughout the year with very minimal effort.

It Strengthens Your Brand

Holiday postcards not only build trust, they consistently keep you in front of your market.

It Offers You Full Control

No upfront fees—pay only when mailings go out. Also, you have the added flexibility to pause, cancel, or adjust the frequency of your mailings at any time.

Don't let another holiday pass you by. Schedule your Holiday Campaign now and keep your business thriving ALL YEAR LONG!



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Stand out in a crowded market with our premium newsletter that does the heavy lifting for you.

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- The content is written for you by industry experts (updated every month) and can be sent in JUST MINUTES.
- A 10" x 15" stand-out size with a 100% impression rate.
- It costs less than a greeting card.
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- Customizable back options for listed/sold data and featured properties.

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