THE Personal MARKETING CO.

Mid-Year Marketing Checklist

REVIEW

- ☐ Evaluate year-to-date performance.
- ☐ Check your contact lists for updated client information or to add new contacts.
- ☐ Ensure branding is current, consistent and professional
- ☐ Reassess business and marketing goals.
- ☐ Have a friend or family member review your website — fresh eyes can often spot little things you may overlook.

REENGAGE

- ☐ Send a mid-year email and newsletter.
- ☐ Personally check in with past clients and referral partners.
- ☐ Plan and promote a seasonal client appreciation event.
- ☐ Start a follow-up program targeting repeat business and referrals.
- ☐ Try changing the format or message of your communications to catch your clients' attention.

UPDATE

- ☐ Refresh listing presentations and buyer packets.
- ☐ Review print materials – postcards, newsletters and business cards.
- ☐ Update website content – testimonials, listings, blog posts.
- ☐ Confirm automated campaigns are still running.
- ☐ Check your mail and neighborhood for new agents hitting the area — always stay current with the competition.

PLAN

- ☐ Outline marketing campaigns through year-end.
- ☐ Enroll new clients in automated marketing programs.
- ☐ Prepare seasonal content – fall, winter, holiday themes.
- ☐ Schedule social media and email campaigns.
- ☐ Set aside time to learn a new skill or master new technology (like Artificial Intelligence) to stay on top of your game.