



my Affirmation: "I embrace technology to get face to face with clients."

Name:

Date:

1.31.24

	INTERACTIONS		PERSONAL ASSESSMENT				
	Past 12 Months	Next 12 Months	Needs Work	Developing	Proficient	Role Model	N/A
1. my Database							
a. I have email addresses and mobile numbers of all my clients and spheres of influence							
b. I am Facebook friends and have LinkedIn contacts of my clients and spheres of influence							
c. I add all new and potential clients into my CRM and categorize them based on their needs/interests							
d. I review, update, and add intel to my database weekly							
e. Other							
	0	0					
2. my CRM Email Campaigns							
a. All clients and spheres of influence are signed up for seasonal email campaigns							
b. I send individual and personal emails daily							
c. I additionally send custom CRM pieces based on my clients and spheres of influence's interests							
d. I track open rates, click throughs, and unsubscribes							
e. Other							
	0	0					
3. my JLS Mobile App							
a. My Broker Branded App is on the homescreen of my mobile device(s) and I use it daily							
b. I share great IDX listings and Buyer/Seller Guides regularly with clients and spheres of influence							
c. I share screenshots and/or video screen recordings of my mobile app on social media							
d. I use my app at Open Houses for client engagement and get visitors to download my App							
e. I promote my app using a QR code and/or link on social to get downloads each month							
f. Other							
	0	0					
4. my Mobile Device(s) / Apps							
a. My mobile device(s) are up to date and I know how to use it (them) to add and edit my database							
b. I have relevant Mobile Apps for my business and I know how to use them (ChatGPT, Riverside.fm)							
c. I send texts, make calls, and personal one-on-one emails daily for Connectivity (engagement hour)							
d. My calendar has repeating/recurring events for business development each week							
	0	0					
5. my Personal and Professional Image							
a. I have professional photos of myself (casual, business, interior, exterior, headshots, waist-up, etc)							
b. I have good video(s) of myself (personal, areas of expertise, neighborhood, "7 second intro", etc)							
c. Personalized Printed materials (buyer/seller guides, property flyers, app cards, Exceptional Homes, etc)							
d. I have branded market expertise materials/content (golf course community, luxury, high-rise condo, etc)							
e. I have ai-generated voice and video avatars I can use for content (elevenlabs.io, heygen.com, etc)							
	0	0					
6. my Personal IDX Website							
a. SEO (Search Engine Optimization) in place for name, location, areas of expertise, keywords, etc.							
b. I promote pages and/or individual listings every day/week direct and/or social media (MLS Rules apply)							
c. Broker 'resume' complete with my areas of expertise, mission statement, video, photos, etc.							
d. Testimonials page has reviews and recommendations (YouTube/Google)							
e. Website checked for links, function, callouts, 'MySolds' enabled, Trendgraphix/Videos embedded, etc.							
f. Hyper-local pages focused with pre-set searches, community photos, videos, etc							
g. Other							
	0	0					
7. my Listings							
a. Get 'activated' on Facebook (personal and/or boost) and Seller's Wall (New on Market/Sold)							
b. Get Every Neighbor Postcards for more listing opportunities (New on Market, Pending, Sold)							
c. QR codes on flyers, sign rider, social media, etc. for lead generation (directed to website, videos, etc)							
d. Have professional quality images, floorplans, Matterport, and video of the home and community							
e. Are 'launched' with Seller Listing Launch and Early Entry for Neighbors							
f. I invite neighbors to Open Houses and are personally notified upon closing with sold price as follow-up							
	0	0					
8. my Social Media							
a. Google business page set-up google.com/business							
b. Regular shares of True, Helpful, Inspirational, Necessary, Kind (THINK) content							
c. Regular engagement with clients and spheres of influence (comments/likes/DMs)							
d. Linked-In Profile complete with client testimonials, endorsements, and regular content.							
e. YouTube Channel publishing informative videos (podcast for SEO long-form and shorts)							
f. Regular schedule of content published utilizing A.I. for video scripts and teleprompter i.e. promptsmart							
g. Other							
	0	0					
9. my Desk Real Estate Tools							
a. Market Insights (my clients are signed up and receive regular reports of local real estate activity)							
b. Property Tracker® (all clients receive relevant Listing Notifications - Not just active buyers)							
c. All clients are signed up for Buyside AVM report and I track their activity regularly							
d. CloudCMA (all my clients receive an Annual Real Estate Review for their home)							
e. Monthly Housing Updates (My clients know what's happening regionally in real estate)							
f. My homeowners are aware of unique JLS Programs i.e. Win-a-trip, MarketReady+, etc.							
	0	0					
10. my Online Demand/Lead Generation							
a. I have completed profiles on Homes.com, Zillow.com, Realtor.com, etc.							
b. I use boost SEM ads to generate interest for listings as well as video ads for my services & expertise							
c. I have a demographic and/or geographic farm through accesshometools.com							
d. I utilize the concierge service of Bear Printing to create regular postcard campaigns							
e. I have an organic SEO online lead generation strategy (hyperlocal keywords)							
f. I use bombbomb for immediate video response to all lead opportunities and follow-ups							
g. I subscribe all leads to the automated tools above and add them to my database							
	0	0					