

A YEAR IN REAL ESTATE:

Making the most of your business

Real estate is always moving. Make sure your business moves with it with our tips below—created to help you keep track of your successes, every quarter.

There's a lot of time in a year. Let's make the most of it.



Q1 Reflection

Hit the ground running by considering your business strategy in terms of where you stand and where you want to go.

- ☐ **Review the previous year's performance.** Look at last year's final numbers and reports to see what worked, what didn't, and what can be improved.
Hey agents: Don't have the numbers? Talk to your broker about setting up reports for you.
- ☐ **Finalize and implement your annual strategy.** Make sure to consider every aspect of the client funnel: marketing, the transaction process, follow-ups, and what your overall workflow will look like.
- ☐ **Prep for tax season.** It's never too early. Check on the data and forms you need using your **back-end software**.
- ☐ **Market, market, market.** Social strategy. CMAs. Follow-ups. It's never too early to **get your name out there** for a satisfying return ahead.

Q2 Busy season

As the weather warms up, so does the market. Be prepared for the hustle and bustle of rising inventory and restless clients, ready to make their next move.

- ☐ **Do your taxes.** With prep, luck, and your back-end software, you'll be ready for a smooth tax session. Use your software to access payroll and forms data for a more seamless experience.
Hey agents: You'll need your tax forms from your brokerage admin.
- ☐ **Add a finishing touch to the client experience.** Show you're ahead of the competition and simplify the moving process by offering **thoughtful add-ons** like moving services, seller disclosures, and more.
- ☐ **Keep a bird's-eye view on your performance.** Hey brokers: Keep a watchful eye on your **performance metrics** and meet with agents regularly to offer support where needed. Note any challenges, like lengthy **transactions** and **signings** or empty funnels, to address next quarter.

Q3 Slowing down

Stay on top of your strategy as the second half of the year begins, along with your goals and overall performance so far, even while busy season slows down.

- ☐ **Double-check the details.** During and after the rush of busy season, take this time to check on the details of your documents to make sure nothing got missed.
- ☐ **Renew your workflow.** Remember the challenges you brushed on last quarter? Now's the chance to address them, both in the short and long term. Explore **software solutions** and tweak your strategy.
- ☐ **Review your busy season.** How was it? Where are you at now in terms of your goals for the year?

Q4 Quiet season

With the end of the year approaching, it's time to finalize your numbers for the year, start your reviews, and look ahead for the new year to come.

- ☐ **Enter recruiting season.** As a much quieter time in the year, this is when agents start assessing their options for next year—so it's the optimal quarter for brokers to **look at agent stats** and recruit as needed.
- ☐ **Assess the year's metrics.** Start prepping your final reports for the year. Make time to sit down and review the highs and lows. This is also a great time to compare your data across past years.
- ☐ **Plan for the new year—with an annual strategy.** Look at your overall strategies and pinpoint where you want to target improvements. Prioritize what you need, from saving time to **staying connected with your circle of influence** and more.

Hey agents: Talk to your broker about making time to go over these reports together!