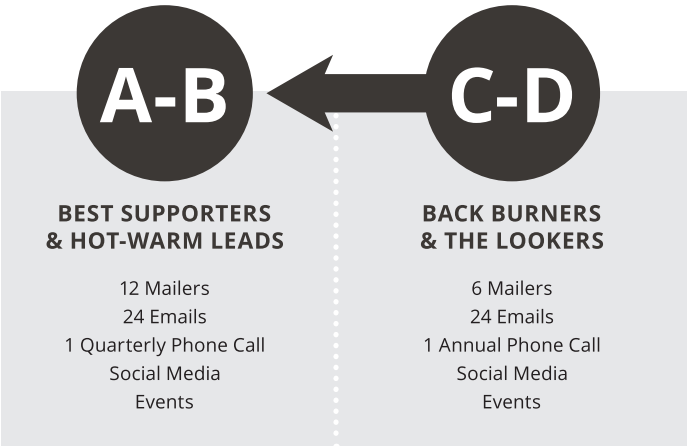
SOI MARKETING BRAINSTORM

HOW WILL YOU MARKET TO YOUR SOI THIS YEAR?

Use this sheet to brainstorm touchpoints you can implement consistently throughout the year to stay top-of-mind with your sphere.

Refer to the chart on the right for the recommended industry-standard touchpoint formula to maintain strong, ongoing connections with your sphere.



DIRECT MAIL

SOCIAL MEDIA

EMAILS

POP-BYS

PHONE CALLS

CLIENT EVENTS

GROWING YOUR SPHERE BRAINSTORM

WHERE DO YOU PLAN TO PROSPECT THIS YEAR?

Use this sheet to brainstorm the touchpoints you'll use to prospect throughout the year. The goal is to expand your sphere, nurture new leads, and build meaningful connections every month.

- Geo Farming
- Open Houses
- Lead Router
- Prospecting Pool
- Networking Events
- Self Promotion
- Paid Ads
- Buying Leads
- Social Media
- Cold Calling

G

GROWING YOUR SPHERE

2 Mailers
2 Phone Calls or Text
1 Handwritten Note

Complete this over 6 weeks, then shift to the A-D category.

DIRECT MAIL

SOCIAL MEDIA

EMAILS

POP-BYS

PHONE CALLS

CLIENT EVENTS

QUARTER 1

JANUARY

DIRECT MAIL

Estimated Cost: _____

EMAILS

Estimated Cost: _____

PHONE CALLS/TEXTS

How many do you need to make this month?

Estimated Cost: _____

SOCIAL MEDIA

What date are you planning your social media on?

Estimated Cost: _____

POP-BYS

Estimated Cost: _____

CLIENT EVENTS

Estimated Cost: _____

G|GROWING YOUR SPHERE _____

TASK: _____ ☐ DONE

DETAILS

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TASK: _____ ☐ DONE

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DETAILS

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FEBRUARY

DIRECT MAIL

Estimated Cost: _____

EMAILS

Estimated Cost: _____

PHONE CALLS/TEXTS

How many do you need to make this month?

Estimated Cost: _____

SOCIAL MEDIA

What date are you planning your social media on?

Estimated Cost: _____

POP-BYS

Estimated Cost: _____

CLIENT EVENTS

Estimated Cost: _____

G|GROWING YOUR SPHERE

TASK: _____ ☐ DONE

DETAILS

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TASK: _____ ☐ DONE

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DETAILS

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QUARTER 1

MARCH

DIRECT MAIL

Estimated Cost: _____

EMAILS

Estimated Cost: _____

PHONE CALLS/TEXTS

How many do you need to make this month?

Estimated Cost: _____

SOCIAL MEDIA

What date are you planning your social media on?

Estimated Cost: _____

POP-BYS

Estimated Cost: _____

CLIENT EVENTS

Estimated Cost: _____

G|GROWING YOUR SPHERE _____

TASK: _____ ☐ DONE

DETAILS

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DETAILS

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QUARTER 2

APRIL

DIRECT MAIL

Estimated Cost: _____

EMAILS

Estimated Cost: _____

PHONE CALLS/TEXTS

How many do you need to make this month?

Estimated Cost: _____

SOCIAL MEDIA

What date are you planning your social media on?

Estimated Cost: _____

POP-BYS

Estimated Cost: _____

CLIENT EVENTS

Estimated Cost: _____

G|GROWING YOUR SPHERE

TASK: _____ ☐ DONE

DETAILS

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TASK: _____ ☐ DONE

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TASK: _____ ☐ DONE

DETAILS

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QUARTER 2

MAY

DIRECT MAIL

Estimated Cost: _____

EMAILS

Estimated Cost: _____

PHONE CALLS/TEXTS

How many do you need to make this month?

Estimated Cost: _____

SOCIAL MEDIA

What date are you planning your social media on?

Estimated Cost: _____

POP-BYS

Estimated Cost: _____

CLIENT EVENTS

Estimated Cost: _____

G|GROWING YOUR SPHERE

TASK: _____ ☐ DONE

DETAILS

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TASK: _____ ☐ DONE

DETAILS

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JUNE

DIRECT MAIL

Estimated Cost: _____

EMAILS

Estimated Cost: _____

PHONE CALLS/TEXTS

How many do you need to make this month?

Estimated Cost: _____

SOCIAL MEDIA

What date are you planning your social media on?

Estimated Cost: _____

POP-BYS

Estimated Cost: _____

CLIENT EVENTS

Estimated Cost: _____

G|GROWING YOUR SPHERE

TASK: _____ ☐ DONE

DETAILS

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TASK: _____ ☐ DONE

DETAILS

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JULY

DIRECT MAIL

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Estimated Cost: _____

EMAILS

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Estimated Cost: _____

PHONE CALLS/TEXTS

How many do you need to make this month?

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Estimated Cost: _____

SOCIAL MEDIA

What date are you planning your social media on?

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Estimated Cost: _____

POP-BYS

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Estimated Cost: _____

CLIENT EVENTS

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Estimated Cost: _____

G|GROWING YOUR SPHERE _____

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DETAILS

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AUGUST

DIRECT MAIL

Estimated Cost: _____

EMAILS

Estimated Cost: _____

PHONE CALLS/TEXTS

How many do you need to make this month?

Estimated Cost: _____

SOCIAL MEDIA

What date are you planning your social media on?

Estimated Cost: _____

POP-BYS

Estimated Cost: _____

CLIENT EVENTS

Estimated Cost: _____

G|GROWING YOUR SPHERE

TASK: _____ ☐ DONE

DETAILS

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TASK: _____ ☐ DONE

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DETAILS

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SEPTEMBER

DIRECT MAIL

Estimated Cost: _____

EMAILS

Estimated Cost: _____

PHONE CALLS/TEXTS

How many do you need to make this month?

Estimated Cost: _____

SOCIAL MEDIA

What date are you planning your social media on?

Estimated Cost: _____

POP-BYS

Estimated Cost: _____

CLIENT EVENTS

Estimated Cost: _____

G|GROWING YOUR SPHERE

TASK: _____ ☐ DONE

DETAILS

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DETAILS

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OCTOBER

DIRECT MAIL

Estimated Cost: _____

EMAILS

Estimated Cost: _____

PHONE CALLS/TEXTS

How many do you need to make this month?

Estimated Cost: _____

SOCIAL MEDIA

What date are you planning your social media on?

Estimated Cost: _____

POP-BYS

Estimated Cost: _____

CLIENT EVENTS

Estimated Cost: _____

G|GROWING YOUR SPHERE

TASK: _____ ☐ DONE

DETAILS

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DETAILS

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NOVEMBER

DIRECT MAIL

Estimated Cost: _____

EMAILS

Estimated Cost: _____

PHONE CALLS/TEXTS

How many do you need to make this month?

Estimated Cost: _____

SOCIAL MEDIA

What date are you planning your social media on?

Estimated Cost: _____

POP-BYS

Estimated Cost: _____

CLIENT EVENTS

Estimated Cost: _____

G|GROWING YOUR SPHERE

TASK: _____ ☐ DONE

DETAILS

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DETAILS

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DECEMBER

DIRECT MAIL

Estimated Cost: _____

EMAILS

Estimated Cost: _____

PHONE CALLS/TEXTS

How many do you need to make this month?

Estimated Cost: _____

SOCIAL MEDIA

What date are you planning your social media on?

Estimated Cost: _____

POP-BYS

Estimated Cost: _____

CLIENT EVENTS

Estimated Cost: _____

G|GROWING YOUR SPHERE

TASK: _____ ☐ DONE

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