TREC COURSE #40360-RECE | 2 HOURS ELECTIVE | PROVIDER #10977

Winter Marketing Intensive Workbook

Strengthen your client relationships before spring. Fill in each page during class; every field can be typed in on a phone, tablet or computer, or printed.

Name

License number

Your Winter Goals

Starting numbers are fine as estimates. The point is a baseline you can beat.

1. How many people are in your database today?

2. How many of this year's closings came from someone who already knew you?

3. One goal for next year that your sphere can help you hit:

Tier Your Top 20

No names on paper. Scroll your first 20 contacts on your phone or CRM and tally each tier. Then add the names to your own copy of the Sphere Spreadsheet on your own time.

Tier A	Closest relationships and best referral potential	**How many:**
Tier B	Good connections, not as consistent	**How many:**
Tier C	Light connections, still worth nurturing	**How many:**

Touchpoint box list: up to 10 A clients you have talked with in the last year

How many will get a box: Drop off or mail:

The Sphere Spreadsheet

Scan to make your own copy in Google Sheets. Add names to the Master List, pick a tier from the dropdown, and the Tier A, Tier B and Postcards tabs fill in for you. Track each touch with checkboxes.

Tip: pick one day a month for a 30-minute check-in.

Year-End Touchpoint Planner

Touch	Who (tier)	What	When	Cost
Thank-you message				
Card or postcard				
Touchpoint box				

Draft your thank-you: thank them, name one real memory, wish them well. No ask.

USPS recommended 2026 mail-by dates for delivery by Dec 25 (contiguous US)

- Dec 17: USPS Ground Advantage and First-Class Mail
- Dec 18: Priority Mail
- Dec 19: Priority Mail Express

Thanksgiving is Thursday, November 26, 2026. Touchpoint boxes work any time Nov to Jan.

Touchpoint Box Supplies: Hot Cocoa

Fits a 6x4x3 box: filler, a card, your business card and three small items, tied with ribbon. Prices are Amazon prices checked Oct 20, 2026 and will change.



6x4x3 boxes

Set of 50, $27.49

Per box: $0.55



Crinkle paper filler

2 lb, $19.45 (about 50 boxes)

Per box: $0.39



1/2 in gold satin ribbon

50 yards, $4.99

Per box: $0.07 (24 in)



Hot cocoa packets

50 count, $8.49 (2 per box)

Per box: $0.34



Snowman marshmallows

72 wrapped, $18.99

Per box: $0.26



Mini candy canes

30 pack, $6.64

Per box: $0.22

About $1.83 per box in supplies, plus card printing. Dropping it off is free; mailing starts around $8.

My cost per box: _____ **Postage if mailed:** _____

Also needed: 3x5 cardstock index cards (Amazon or Walmart). Send to up to 10 A clients.

Your Touchpoint Box Card

Use the card design from the class page. Print it straight onto 3x5 cardstock index cards (Amazon or Walmart) if your printer allows the size, so there is nothing to cut. Sign each one by hand.



Your card, shown smaller than actual size. Download the 3x5 PDF from the class page.

Print check:

- ☐ Printer settings: paper size 3 x 5 in, cardstock or heavy paper
- ☐ Print one test card before the full stack
- ☐ Add your name, phone and a handwritten line

12-Month Newsletter Calendar

One topic per month: local, useful, personal.

January

February

March

April

May

June

July

August

September

October

November

December

Texas: homestead exemption applications are generally due April 30; appraisal protests by May 15 or 30 days after the notice.

Annual Budget Worksheet

Yearly spend on a tier divided by people in that tier = cost per contact.

Category	Tier A $	Tier B $	Tier C $	Total $
Email (newsletter platform)				
Print and mail				
Touchpoint boxes and gifts				
Events				
Social				
Tools				
Total				

Cost per contact

Tier A:		÷ people		= $ per contact	
Tier B:		÷ people		= $ per contact	
Tier C:		÷ people		= $ per contact	

Before you spend: Which tier? What should they feel or do? Is it in the budget? What is the follow-up?

Winter Social Planner

Pick three pillars:

- [ ] Year in review
- [ ] Gratitude (client photos only with permission)
- [ ] Local winter events
- [ ] Personal

Sample week: one post idea for each day you will post

Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Sunday	

My daily 15-minute engagement time:

Reply to every comment, comment on 5 past clients' posts, send 2 personal messages.

30-Day Implementation Checklist

Day 1 is October 23. Day 30 is November 21, the Saturday before Thanksgiving week.

Days 1 to 7

- [ ] Add your top 20 to the Sphere Spreadsheet
- [ ] Fix missing mailing addresses
- [ ] Order touchpoint box supplies

Days 8 to 14

- [ ] Set up or restart your newsletter
- [ ] Add your business address in your email tool

Days 15 to 21

- [ ] Finalize the budget
- [ ] Order holiday cards and postcards

Days 22 to 30

- [ ] Schedule Thanksgiving thank-you messages
- [ ] Schedule one week of winter posts
- [ ] Deliver or mail touchpoint boxes (Nov to Jan)

Notes

AFTER CLASS | NOT PART OF THE CE COURSE

Want your marketing done for you?

Fraser Marketing is a done-for-you marketing partner for real estate professionals. Everything is designed in your branding by real people. You approve it, and we take it from there.

Your listings

Your eflyer sent weekly to Realtors in your MLS area (Texas and Oklahoma), plus branded flyers, brochures and property postcards.

Your sphere

A monthly newsletter sent to your list on the 1st and social posts ready for you to post on the 28th. Postcard and yard sign design included; print and mail extra.

CENTURY 21 MIKE BOWMAN AGENTS

20% off monthly Pro

$120/mo (was $150)

Join monthly Pro by Dec 31, 2026 and keep 20% off while your membership stays active. Only through the Century 21 Mike Bowman partner page.

Scan for the partner page