

Year End Checklist for Real Estate Agents

Agents—the year isn't over yet! It's important to take the next month to reflect, refresh and refocus. Think back on your successes from the last 12 months, determine areas of improvement and prepare your business for another exciting year of selling. And don't forget to connect with your clients! Use the year end checklist items below to guide you through some important tasks before January arrives.



CHECK IN WITH YOUR CLIENTS

It's crucial to maintain a relationship with your client base year-round, but the holiday season is an excellent opportunity to check in and show your appreciation. You might do this with a card, a gift or even a quick phone call to see how they've been doing.



CLEAN UP YOUR CONTACT LISTS

Speaking of clients, take some time at the end of the year to review your contact lists and ensure they're up-to-date. Fill in any missing information, organize your database and remove any contacts that are no longer relevant. As you're doing this, take the opportunity to reach out to clients you haven't spoken to in a while.



AUDIT YOUR MARKETING MATERIALS

Typically, your marketing materials are the first impression you'll make on a prospective client! This can include your website, social media profiles, headshots, flyers, videos, business cards and pretty much anything else you might use to attract leads. Refresh items that are outdated and ensure that your branding and messaging is clear, concise and consistent across media types



TAKE STOCK OF TOOLS & RESOURCES

The end of the year is a great time to both reevaluate the current resources you've been using for your sales and marketing, as well as research new tools to add to your toolbox in the coming year. Along the same vein, review any subscriptions or accounts you may have and determine which ones serve you best. You may even be able to save some money by cutting out any unnecessary ones!



REVIEW YOUR FINANCIALS

The financial side of your business may not be the most exciting or fun aspect of your job, but it certainly is an important part of maximizing profit and remaining successful. Review your budget and potentially create a new one for the new year. Investigate areas where you can cut costs. Sort through and organize financial documents to effectively prepare for tax season (which will arrive before you know it!).



EVALUATE YOUR GOALS

Compare your sales numbers and results against the goals you set for yourself at the beginning of the year. Identify the objectives you achieved as well as the areas where your numbers may have fallen short, then use those insights to inform next year's goals! Each trip around the sun is another opportunity for new challenges and achievements.



CELEBRATE YOUR SUCCESSES

Last, but not least, don't forget to congratulate yourself on your wins for the year! Take some time to reflect on everything that went well, then use that energy and excitement to propel you into another successful twelve months.