



SRES® Marketing Plan

How to Create a Personalized
Plan to Attract 50+ Real Estate Clients



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Congratulations on earning your SRES® designation!

Taking this important step undoubtedly sets you apart from other agents in your market and helps establish your credentials with 50+ buyers and sellers.

Still, finding success with older clients also requires preparing and executing a solid personal marketing plan. The SRES® Council is very interested in your success, which is why we compiled this guide. We hope it gives you beneficial tips on various strategies, tools and tactics, including special resources offered exclusively to SRES® designees.

Whether you prefer traditional real estate “farming” techniques or lean towards newer online strategies, you’ll discover ways to make your marketing efforts easier and more effective. No agent can (or should try to) execute every potential marketing technique, but you can make smarter decisions about what works best.

We hope the following pages guide you in that direction!

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Start with a Strategy

Earning the SRES® designation certainly gives you an edge over non-designated agents, in terms of understanding and attracting 50+ buyers and sellers. That said, this is a large and diverse group of consumers. You'll probably be more successful if you initially concentrate your efforts on a particular niche market within the larger 50+ group.

Why narrow your focus?

First, it will make it much easier to decide which marketing strategies and tactics will work best. It also helps you develop more extensive knowledge and expertise about issues that are of particular interest to your buyers and sellers, instead of trying to stay current on every senior topic.

Don't worry that a narrower focus will reduce your chances to find business. Usually, the opposite occurs. Once you become the go-to person in one niche market, opportunities often spill over from other related areas.

Referral business is particularly rich among older buyers and sellers. Generally speaking, seniors love sharing their experiences. Win them over with superior real estate services and they'll undoubtedly tell friends, family and even casual acquaintances about you.

Picking a Niche

In the seniors market, niche opportunities are usually (but not always) linked to your immediate geographic area. Beyond being "the senior housing expert in MyTown" there are many other ways to niche your services, including specializing in:

Specific types of housing – active adult communities, continuous care retirement centers, multigenerational housing, rentals, manufactured housing

Recreational communities – golf course living, lake homes

Focus or life-stage – downsizing, empty nesters, retirement, veterans, widows/widowers

Shared hobbies or interests – sports, pets, travel, charitable organizations

Other unique possibilities – overseas retirement (focused on a particular destination), co-housing communities, aging-in-place resources

Choose Your Tools and Tactics

Once you've determined the focus of your SRES® real estate practice, the next step is deciding the best way to attract and develop business with these buyers and sellers. There are countless ways to do this, including online marketing techniques, advertising, printed newsletters, postcards, emails, social media, seminars, networking events, and on and on...

With so many choices, what works best? The answer varies for every agent. Once again, it's important to focus on doing a few things very well. Deciding which marketing tools and tactics work best means you must:

1. Know where to find potential buyers and sellers.

Thinking in terms of your niche market, where are you most likely to find future clients?

Examples:

- Do the buyers and sellers you want to reach spend time reading and researching online? (If so, what topics might attract them to your site?)
- Are they more likely to read traditional mail? (How can you compile a good mailing list?)
- Where do they physically gather? (Can you participate in their activities?)
- Where do they socialize online? (Can you connect with them there?)

These and other questions will help you zero in on the best marketing tools and tactics for your situation.

2. Know yourself.

It's also important to take an inventory of your strongest personal marketing assets. Examples:

- Do you love making new acquaintances? (Be sure to allow time for face-to-face networking.)
- Are you a natural public speaker? (Seminars are an exceptional tool for reaching seniors.)
- Are you better with the written word? (Blogging, for example, is an excellent way to attract local traffic to your website.)

If, however, you hate writing and can't devise ways to generate blog content, it's probably better to focus on other marketing tactics. Likewise, if public speaking terrifies you, maybe you should nix the idea of offering seminars.

Everyone has their strengths and weaknesses. Personal introspection will guide some of your marketing decisions. Ongoing research on your niche market and various marketing tactics will help you discover new and better ways to execute your plans.

Popular SRES® Marketing Tactics

There are MANY different ways to market your services to 50+ buyers and sellers. Most agents concentrate on a handful of tactics best suited to their skills and objectives. To imagine how you might tackle a new marketing tactic, consider the following examples of five agents employing popular approaches for cultivating business with seniors. While each example pertains to a particular scenario, these agents' tactics can easily be adapted to your situation.

- 1. Seminars**
- 2. Networking**
- 3. Content Sharing**
- 4. Local Media**
- 5. Leads Management**



1. Seminars

Scenario: Gail practices real estate on the outskirts of a major metropolitan area. She decided to earn her SRES® designation when a new active adult community, Lakeside Pavilions, broke ground in her market, providing a desirable avenue for expanding her business.

She knows public speaking is an excellent way to promote her services to seniors because she can spotlight her knowledge and gain instant credibility as an “expert.” She’s comfortable speaking to groups and has been successful building rapport with audiences. Her primary challenge is developing an appealing offer that will attract Lakeside Pavilions’ interest.

Her Plan: Gail recognizes that the marketing director at Lakeside Pavilions needs to bring traffic to the community—traffic that might be converted into tours and closings. If Gail can pitch a seminar program that will attract more active adults onto the grounds, the director will probably be interested and may even help promote the event.

- Before contacting the marketing director, Gail considers potential seminar topics. She prefers a program on “The True Costs of Active Adult Living” that will look at both sides of the coin—the cost of active adult communities, but also how to fairly compare this to the cost of staying in a current home. She’ll also compare costs to benefits and suggest that a few minutes be set aside so the marketing director can address questions concerning Lakeside Pavilions.
- Gail sends an email to the marketing director, explaining her interest in collaborating on an onsite seminar and touching on her credentials. Once the meeting is confirmed, she comes armed with details on her preferred seminar topic, but also prepares a couple back-up ideas in case the marketing director wants to take a different approach.
- The meeting goes well and Lakeside Pavilions offers to advertise the event in the local paper and send invitations to their mailing list. The seminar draws a respectable crowd and several couples decide to tour the facilities immediately after the program. Gail agrees to offer her program again and feels confident there will be opportunities to collaborate on other topics.

Results: By thinking in terms of helping her key constituent, the marketing director at Lakeside Pavilions, Gail created a true win-win opportunity. Not only is she involved in a referral stream at Lakeside Pavilions, she’s also cementing her ties to the community and its residents. When residents decide to enter the community, she is in an excellent position to win the listing on their existing home. Likewise, if they later move from Lakeside Pavilions, she’ll be top-of-mind for assisting in future transactions.



2. Networking

Scenario: Based in a Midwest city of roughly 45,000 Vince has been in the real estate industry for nearly 20 years. He's held his own, but wants to put a tighter focus on his networking activities so they're better aligned with his personal interests and business goals. With the kids out of the nest, he and his wife want to devote more of their time to giving back to their community, ideally in a way that will help Vince connect with seniors, his preferred client base.

The local senior center is always interested in both financial and volunteer assistance. Vince knows there are many ways he could pitch in, but he also knows he'll enjoy helping—and stick with it longer—if he's selective about his commitments.

His Plan: To make the most of the time he'll devote to service, Vince takes several steps.

- He signs up to deliver Meals on Wheels one morning a week. In addition to joining the fight against senior hunger, he enjoys the warm interactions in seniors' homes and gains a firsthand perspective on their housing needs. Vince also enjoys interacting with other volunteers preparing the meals, people from other walks of life who share his interest and concern for seniors. Over time, there are opportunities to discuss his real estate practice with the other volunteers and while making deliveries.
- Vince is also an avid fan of the Comets, a successful minor league baseball team based in their town. He offers to organize once-a-month outings to see the team play, an idea that immediately scores points with the events director at the senior center.
- Taking this idea one step further, Vince approaches a local elder care attorney and a financial advisor about underwriting some of the expenses associated with the Comets' games. Both men agree. They also work together on a small flyer that acknowledges their role in these events and briefly mentions their respective services. The flyers are passed out to participants along with their tickets.

Results: Networking is more enjoyable and more successful when it's built on genuine interests. Vince's efforts at the senior center are helping him forge new and meaningful referral connections with seniors, while also guaranteeing he gets to the stadium at least once a month. By reaching out to other specialists, he's collaborating regularly with senior-service providers who help strengthen his team and provide additional referral opportunities. Home run!



3. Content Sharing

Situation: Robin has always excelled at being “the source of the source.” Whether it’s knowing what’s happening around town, who to contact to solve unique problems or which businesses are opening (or closing), Robin always seems to have her finger on the pulse of what’s happening and can answer people’s questions. While she’s a voracious reader of online articles (one key source of her knowledge), she’s never leveraged this resource to promote her seniors-focused real estate practice...until now.

Her Plan: Robin knows that the over-50 crowd in her market are increasingly active on Facebook. She’s also been compiling a growing list of email addresses, intending to launch an emailed newsletter. To leverage content sharing as a business development tool, she takes these steps:

- Robin sets up a system to flag and organize different content she finds (real estate topics, local events, home maintenance, etc.) using folders and tags. (Robin prefers Evernote, but many other content bookmarking tools can be used.) She also blocks out time on her calendar to share content regularly on her Facebook business profile and compile content for her emailed newsletter.
- To produce her newsletter, Robin selects an email marketing provider, adapts a newsletter template to her needs (incorporates her logo and other branding elements) and imports her email list. The template will feature headlines and introductory copy from various online sources (with links to the full article); using content she bookmarked earlier, Robin selects six timely articles to include in her newsletter, which she publishes every other week.
- Every day or two, Robin shares some of the content she’s flagged on Facebook, adding her own professional commentary. She also takes time to acknowledge and respond to any comments left by others on her Facebook page.

Results: Using the tracking tools built into her email marketing provider’s platform, Robin can tell how many people are opening her newsletter and which articles are most popular. Likewise, Facebook’s Insights tools help her improve her content sharing choices. In time, Robin builds a solid following and more online interactions with past and potential clients. She has also received several inquiries that can be tracked directly to her content sharing efforts.



4. Local Media

Situation: Sharon wants to establish herself as a leading real estate expert in her suburban community. Since the local population keeps trending upward in age, it makes good sense to emphasize her special knowledge of senior housing issues and her SRES® designation.

She enjoys writing and has noticed the Glendale News, her suburban newspaper, isn't reporting on real estate as much as it used to. When it does, the articles are syndicated from national sources and don't discuss local developments. Sharon would like to approach the editor and see if she can fill this gap.

Her Plan: Sharon has made a point of placing occasional advertisements in the Glendale News, which should help the editor recognize her as an active member of the real estate community (and a supporter of the paper). To move her plan forward, she also takes these steps:

- Researching past topics covered in publications by the SRES® Council and other sources, Sharon compiles a list of potential article titles related to real estate and senior housing. In many cases, she can rewrite what's already been developed and incorporate a couple local examples. She goes ahead and polishes up one article (Ready to Sell? 5 Inexpensive Ways to Update Older Homes) so she can demonstrate her knowledge and writing skills.
- Sharon schedules a time to meet with the editor and share her ideas, which are immediately welcomed. They agree to run Sharon's column every other week, including her photo and a small bio with her contact information.
- When the first article is published, Sharon republishes it on her blog, crediting the Glendale News as the original source and linking her blog post to the online version of the article. Even though the newspaper gets search engine credit for her content, Sharon benefits from generating linked content and credibility as a local authority. On her blog, she supplements these posts with other content written solely for her site.

Results: Three months later, Sharon has already received several inquiries from the visibility she's gained from her column in the Glendale News and from her blog. The publisher also owns several other suburban journals and has asked Sharon about running her column in the community adjacent to her primary market—an area where she also lists homes from time to time. She agrees, offering to tweak her examples, as needed, for the expanded coverage.



5. Leads Management

Situation: Richard entered real estate eight years ago as a second career. He's enjoyed the business (especially his work with seniors) and has been relatively successful, but he recognizes he'd probably see better results if he was more organized and took a more disciplined approach to his marketing efforts. That said, Richard feels like his plate is already full and admits it's unlikely he'll make much progress on his own.

His Plan: Richard recognizes that the best way to get over his hump is to find help setting up and managing a new system. He researches and selects a contact management platform then hires a new assistant named Lynne, who has school-aged children and wants to earn a little money but isn't interested in a full-time position. They agree she'll spend extra time while they're setting things up, but the longer-term plan is for her to devote five hours each week updating contacts and assisting with related mailings. Key steps include:

- Using his contact management system, Richard builds a solid database for his prospecting efforts. In addition to basic contact information, he includes fields to distinguish between seniors and their adult children, selling soon vs. long-term prospects, etc. Lynne enters all Richard's current contacts into the system and researches sources for additional contacts.
- Richard also begins compiling a database of professional providers of related services, including elder care professionals, financial advisors, lenders, lawyers, movers, etc. Some of these contacts are regular members of his "team," while others are resources he may need to draw upon from time to time.
- Richard then maps out a one-year "contact marketing plan," with a different schedule of activities for each group in his database. For example, all senior homeowners will receive his quarterly one-page "local real estate market wrap-up" while those flagged as "selling soon" receive additional mailings and follow-up phone calls. His network of professional providers, on the other hand, will receive a friendly letter each quarter, summarizing recent transactions and sharing any new or helpful resources for seniors. He always concludes with a request to keep him in mind for any real estate-related needs.

Results: It takes Richard and Lynne several weeks to get all the pieces into place, but once his ongoing plan starts rolling out, Richard quickly sees the benefits. His marketing efforts are now much more focused, reaching the right people, at the right time, with the right message. Even though his marketing expenses went up, Richard can already see that the costs will be more than offset by new business. In fact, he's thinking about asking Lynne if she can increase her hours.

Action Plans

Once you've determined your strategy (what type of business you want to attract) and identified tactics (how you'll go about marketing your services), it's time to map out an action plan. Try to strike a healthy balance; you need to make sure you're not overlooking any important details, but you also don't want to make your plans so complicated that they're difficult to execute. Some factors to consider:

Schedule: If you're using postcards, how often will you mail them? If home buyer/seller seminars are part of your plan, how often will you host them? When will you attend key networking events? Whatever activities are included in your marketing plan, be sure to get all dates and intermediate deadlines posted to your calendar. And if your plan includes XX minutes for daily prospecting calls or social media updates, be sure this time is blocked off too.

Budget: How large is your marketing budget? Can you accommodate all your planned marketing activities or do you need to make some adjustments?

Manpower: Do you have an assistant who can take up certain aspects of your marketing plan? Or can you rely upon an agency or other outside resources to complete various tasks?

Related systems: How will you respond to leads? Do you have systems in place to capture inquiries and make sure every lead receives a timely response? Sometimes speed is of the essence, while other leads need to be slowly and carefully nurtured over time.

Other systems may be needed to ensure routine marketing tasks occur without a hitch. How will you maintain updates to your mailing lists? If you're relying upon a blog to generate traffic to your site, how will you find and post material to your site?

Measuring results: Marketing plans can and should be adjusted over time. But you can only make smart adjustments if you're measuring your results. Put systems in place to do this and schedule times (perhaps quarterly) to evaluate what's working.

Making adjustments: Don't be afraid to modify your plan, but also be sure you've given each marketing tactic a fair chance. It can take months of weekly (or more frequent) blog posts, for example, to see meaningful results. And your results may also depend on other factors, such as whether your mailing lists are hitting the right people, or whether your message is truly striking a chord with your intended clients. Constantly evaluate the "quality" of your marketing activities, because quality often trumps quantity when it comes to connecting with consumers.

Support from SRES®

Every agent has their own approach to marketing, but the SRES® Council works hard to help designated agents reach their goals. In addition to this marketing guide, every SRES® designee can access a full suite of resources designed to help you cultivate your knowledge and promote your business. Additional benefits are frequently added, so be sure to periodically explore the Members area of seniorsrealestate.com to discover new resources.

Ten Way to Use SRES® Marketing Resources

1. **Promote your services with specialized printed marketing tools.**
2. **Compile handouts to educate clients.**
3. **Fuel your content marketing needs.**
4. **Promote your SRES® designation on Facebook.**
5. **Feature your SRES® designation on your website.**
6. **If you just earned your SRES® designation, announce it.**
7. **Use short-cuts for corresponding and conversing with clients.**
8. **Add a professional touch to your presentations.**
9. **Get more referrals.**
10. **Leverage opportunities with SRES® business partners.**

Ten Ways to Use SRES® Marketing Resources

1. Promote your services with specialized printed marketing tools.

Geared towards a wide variety of 50+ buyers and sellers, these professionally-designed materials can help you promote your business with consumers interested in making a change and gaining “More of What Your Live For.” Download and edit **postcards**, **fliers** and **posters**, adding your name, contact details and photo; a customizable **consumer brochure** can also be ordered through the Online Print Shop.

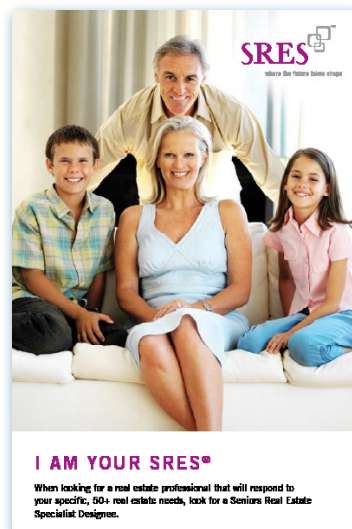
Sample Postcard



Sample Flier



Consumer Brochure



Sample Poster

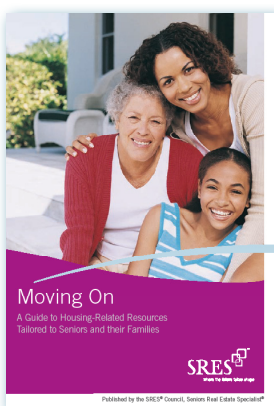


2. Compile handouts to educate clients.

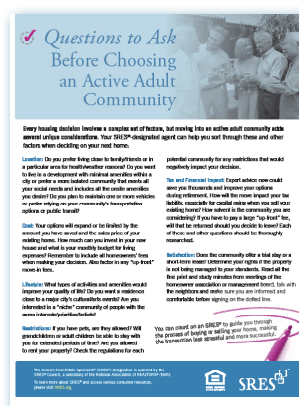
As people age, their real estate decisions often become more complex. To educate your buyers on a myriad of related issues, turn to the ***Moving On*** guide, designed to help families through the difficult issues and unique situations they may encounter during the process of selling their homes and moving on.

Also investigate our growing collection of **consumer one-sheets** which can be used to guide a conversation with clients about everything from choosing an active adult community to unconventional retirement options, or from multigenerational living tips to cleaning and staging a home, and many other topics!

Moving On Guide



Consumer One-Sheet Sample



3. Fuel your content marketing needs.

One of the best ways to promote your specialized knowledge is to publish interesting and informative content on your website/blog, in client newsletters or in emailed articles. But where can you find that content? For starters, check out the monthly **Consumer Newsletters**, already formatted for distribution (just insert your contact information). Also consider using the SRES® consumer one-sheets, or even portions of the articles in *The SRES® Professional** to supplement your content marketing efforts. Everything published by the SRES® Council for its members is available for your use.

Consumer Newsletter Sample



* Most articles in *The SRES® Professional* are written for real estate professionals, but could easily be modified for consumers.

4. Promote your SRES® designation on Facebook.

Tell the world about your SRES® designation and the value you bring to 50+ clients by adding the **SRES® Facebook App** to your business or group page. Once installed, you can customize the tab with your own profile photo. It's an excellent way to educate consumers about the SRES® designation and tout your credentials. Go to the SRES® Facebook page (Seniors Real Estate Specialist) to download yours.

SRES® Facebook App



5. Feature your SRES® designation on your website.

Start by adding the **SRES® logo** along with descriptive content about your designation and the benefits clients gain from your special skills. (For potential sources of this content, take a look at the SRES® consumer brochure, the Moving On guide and the consumer one-sheet titled “Why Turn to an SRES?”) Also consider incorporating **SRES® banner ads**. Two formats are available—a horizontal header image and a tall, narrow ad that can be placed along the edge of a page.

6. If you just earned your SRES® designation, announce it.

Use the SRES® Council’s **prewritten press release** to alert your local media to the national recognition you’ve earned.

7. Use short-cuts for corresponding and conversing with clients.

The SRES® Council has also prepared a whole collection of **customizable letters and scripts** that can be used to send letters or call clients, prospects and various service professionals. Rely on these convenient templates to inquire on expired listings, to approach FSBO sellers, to follow up with open house visitors and for many other situations.

8. Add a professional touch to your presentations.

Whether you're hosting a real estate seminar for 50+ consumers, or introducing your listing/buyer representation services to prospective clients, you'll make a better impression if your presentation materials look professional and coordinate with other SRES®-branded handouts. **Two different templates** are offered, each including sample content that can be modified to suit your needs.

SRES® Branded PowerPoint Templates



9. Get more referrals.

In addition to our agent-focused website (seniorsrealestate.com) the SRES® Council also actively promotes the SRES® designation to consumers via sres.org and extensive consumer advertising. Many visitors use the **online directory** to find an SRES® designee (so make sure your profile is complete and accurate!).

Beyond consumers, real estate professionals also use the online directory to identify referral candidates. To optimize your chances of connecting with other agents, consider participating in one or more social networks specifically designed for Seniors Real Estate Specialists, including the official **SRES® Online Community** (if you haven't already joined, request an invitation from sres@realtors.org. Or connect with us on **Facebook** (Seniors Real Estate Specialist), **Twitter** (@SREScouncil) or **LinkedIn** (SRES Seniors Real Estate Specialist).



10. Leverage opportunities with SRES® business partners.

The SRES® Council has partner relationships with many other senior organizations offering a range of informational resources for your clients and discounted services to SRES® members—as well as access to the “Find an SRES®” directory on their websites. A list of current **business partners** and links to details on their services are posted in the Members section of our site.

Beyond Marketing

In addition to all the resources mentioned above specifically designed for marketing support, the SRES® Council also provides extensive “continuing education” benefits to members. These include an ongoing series of webinars featuring experts on various subjects (with over 40 topics archived online) and the bi-monthly newsletter *The SRES® Professional*. Through these resources, members can stay informed about timely topics for seniors and gain additional business-building tips.

Final Thoughts

When you decided to enter the real estate industry, it’s quite possible that business development was secondary to your primary interest—working with clients. But to attract those clients, agents need to adopt successful marketing strategies. Hopefully, the tips and resources offered here by the SRES® Council will take you much closer to reaching your goals!





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