

**Reasons to Call**

Pick one reason to call per month. Then reference the appropriate dialogue from the monthly resource files.

**Email or Text**

Pick one email or text to send for each month. Use the template provided in the monthly resource files.

**Mail/Postcards (see AMG.media)**

Special occasion cards are required each month. One additional mailer should be sent each month. Use the templates in the monthly resource files.

**Client Events**

Select one client event per quarter. Reference the specific event in the quarterly resource files.

**Client Pop-By Gifts**

Select one client Pop-By Gift per quarter. Every client should get 2 gifts a year. Reference the Qtrly Gift Docs.

<p><b>January</b></p> <p><input type="checkbox"/> Happy New Year Dialogue <input type="checkbox"/> Annual Client Review <input type="checkbox"/> Annual Market Update Call</p>	<p><input type="checkbox"/> Happy New Year Email/Text <input type="checkbox"/> Quarterly Market Summary Email <input type="checkbox"/> Annual Market Update Email</p>	<p><input type="checkbox"/> Birthday &amp; Home Anniv. Cards <input type="checkbox"/> Qtrly Market Summary Postcard <input type="checkbox"/> Annual Market Update Letter</p>	<p><input type="checkbox"/> Bowling Event** <input type="checkbox"/> Movie Event* <input type="checkbox"/> Pick Up a Pizza Event** <input type="checkbox"/> Charity Fundraiser*** <input type="checkbox"/> _____ Date of the Event: _____/_____/_____ Budget: _____</p>	<p><input type="checkbox"/> Winter Scarf or Hat <input type="checkbox"/> Valentine's Chocolates <input type="checkbox"/> Baking Bliss <input type="checkbox"/> Winter Warmth <input type="checkbox"/> Movie Night Essentials <input type="checkbox"/> _____ Delivery Date: _____/_____/_____ Budget: _____</p>
<p><b>February</b></p> <p><input type="checkbox"/> Vendor List Update <input type="checkbox"/> Happy Valentine's Day <input type="checkbox"/> Event Invite Call</p>	<p><input type="checkbox"/> Vendor List Update Email <input type="checkbox"/> 5 Most Expensive Homes Sold <input type="checkbox"/> Event Invite Email/Text</p>	<p><input type="checkbox"/> Birthday &amp; Home Anniv. Cards <input type="checkbox"/> Client Valentine's Letter <input type="checkbox"/> Event Invite Postcard</p>	<p><input type="checkbox"/> Greenhouse Event** <input type="checkbox"/> Dumpster Day Event* <input type="checkbox"/> Zoo Event* <input type="checkbox"/> Baseball Game Event** <input type="checkbox"/> Golf Outing Event** <input type="checkbox"/> _____ Date of the Event: _____/_____/_____ Budget: _____</p>	<p><input type="checkbox"/> Sweet Spring Surprise <input type="checkbox"/> Caffeine Kickstart <input type="checkbox"/> April Showers <input type="checkbox"/> Easter Bunny Treats <input type="checkbox"/> BBQ Kits <input type="checkbox"/> _____ Delivery Date: _____/_____/_____ Budget: _____</p>
<p><b>March</b></p> <p><input type="checkbox"/> Sold in Your Neighborhood <input type="checkbox"/> Painting Discount <input type="checkbox"/> Event Thank You</p>	<p><input type="checkbox"/> Renovation Cost/ROI Estimates <input type="checkbox"/> Painting Discount Reminder <input type="checkbox"/> Event Thank You Email/Text</p>	<p><input type="checkbox"/> Birthday &amp; Home Anniv. Cards <input type="checkbox"/> Painting Discount Postcard <input type="checkbox"/> Event Thank You Postcards</p>	<p><input type="checkbox"/> Mulch Discount <input type="checkbox"/> Greenhouse Discount <input type="checkbox"/> Event Invite</p>	<p><input type="checkbox"/> Quarterly Market Summary <input type="checkbox"/> Greenhouse Discount Reminder <input type="checkbox"/> Event Invite Email/Text</p>
<p><b>April</b></p> <p><input type="checkbox"/> Happy Mother's Day <input type="checkbox"/> AC Tune Up Discount <input type="checkbox"/> Event Reminder Call</p>	<p><input type="checkbox"/> 5 Most Expensive Homes Sold <input type="checkbox"/> AC Tune Up Discount Email/Text <input type="checkbox"/> Event Reminder Email/Text</p>	<p><input type="checkbox"/> Mother's Day Cards <input type="checkbox"/> Birthday &amp; Home Anniv. Cards <input type="checkbox"/> Event Invite Postcard</p>	<p><input type="checkbox"/> Annual Vendor List <input type="checkbox"/> Sold in Your Neighborhood <input type="checkbox"/> Happy Father's Day</p>	<p><input type="checkbox"/> Annual Vendor List <input type="checkbox"/> Sold in Your Neighborhood <input type="checkbox"/> Event Thank You Email/Text</p>
<p><b>May</b></p> <p><input type="checkbox"/> Mid-Year Market Update <input type="checkbox"/> Ice Cream Shop Discount <input type="checkbox"/> Event Invite</p>	<p><input type="checkbox"/> Quarterly Market Summary <input type="checkbox"/> Ice Cream Shop Discount <input type="checkbox"/> Event Invite Email/Text</p>	<p><input type="checkbox"/> Birthday &amp; Home Anniv. Cards <input type="checkbox"/> Ice Cream Discount Postcard <input type="checkbox"/> Qtrly Market Summary Postcard</p>	<p><input type="checkbox"/> Golf Outing Event** <input type="checkbox"/> Family Photo Event*** <input type="checkbox"/> Orchard Event* <input type="checkbox"/> Zoo Event* <input type="checkbox"/> Baseball Game Event** <input type="checkbox"/> _____ Date of the Event: _____/_____/_____ Budget: _____</p>	<p><input type="checkbox"/> Popsicle Pizzazz <input type="checkbox"/> Lemonade Luxury <input type="checkbox"/> Sweet Summertime <input type="checkbox"/> Back to School Supplies <input type="checkbox"/> Football Game Snacks <input type="checkbox"/> _____ Delivery Date: _____/_____/_____ Budget: _____</p>
<p><b>June</b></p> <p><input type="checkbox"/> Sold in Your Neighborhood <input type="checkbox"/> Ice Cream Discount Reminder <input type="checkbox"/> Event Invite Reminder</p>	<p><input type="checkbox"/> 5 Most Expensive Homes Sold <input type="checkbox"/> Ice Cream Discount Reminder <input type="checkbox"/> Event Reminder Email/Text</p>	<p><input type="checkbox"/> Birthday &amp; Home Anniv. Cards <input type="checkbox"/> Portfolio Value Postcard <input type="checkbox"/> Event Invite Postcard</p>	<p><input type="checkbox"/> Sprinkler Winterization Disc. <input type="checkbox"/> Furnace Tune Up Discount <input type="checkbox"/> Event Thank You</p>	<p><input type="checkbox"/> Fall Home Maintenance <input type="checkbox"/> Discount Reminder <input type="checkbox"/> Event Thank You Email/Text</p>
<p><b>July</b></p> <p><input type="checkbox"/> Fall Clean Up Discount <input type="checkbox"/> Furnace Tune Up Discount <input type="checkbox"/> Event Invite</p>	<p><input type="checkbox"/> Quarterly Market Summary <input type="checkbox"/> Discount Reminder <input type="checkbox"/> Event Invite Email/Text</p>	<p><input type="checkbox"/> Birthday &amp; Home Anniv. Cards <input type="checkbox"/> Qtrly Market Summary Postcard <input type="checkbox"/> Event Invite Postcard</p>	<p><input type="checkbox"/> Family Photo Event*** <input type="checkbox"/> Bowling Event** <input type="checkbox"/> Movie Event* <input type="checkbox"/> Pie Giveaway Event** <input type="checkbox"/> Christmas Tree Event** <input type="checkbox"/> _____ Date of the Event: _____/_____/_____ Budget: _____</p>	<p><input type="checkbox"/> Halloween Spirit <input type="checkbox"/> Hot Cocoa &amp; Mugs <input type="checkbox"/> Cookie Comfort <input type="checkbox"/> Warm Wonders <input type="checkbox"/> New Beginnings <input type="checkbox"/> _____ Delivery Date: _____/_____/_____ Budget: _____</p>
<p><b>August</b></p> <p><input type="checkbox"/> Local Holiday Shopping Guide <input type="checkbox"/> Thankful For Your Support <input type="checkbox"/> Event Invite Reminder</p>	<p><input type="checkbox"/> Local Holiday Shopping Guide <input type="checkbox"/> 5 Most Expensive Homes Sold <input type="checkbox"/> Event Reminder Email/Text</p>	<p><input type="checkbox"/> Local Holiday Shopping Guide <input type="checkbox"/> Thank You for Your Support <input type="checkbox"/> Birthday &amp; Home Anniv. Cards</p>	<p><input type="checkbox"/> Merry Christmas <input type="checkbox"/> Happy Holidays <input type="checkbox"/> Event Thank You</p>	<p><input type="checkbox"/> Happy Holidays <input type="checkbox"/> Schedule Client Annual Review <input type="checkbox"/> Event Thank You Email/Text</p>
<p><b>September</b></p> <p><input type="checkbox"/> Merry Christmas <input type="checkbox"/> Happy Holidays <input type="checkbox"/> Event Thank You</p>	<p><input type="checkbox"/> Happy Holidays <input type="checkbox"/> Schedule Client Annual Review <input type="checkbox"/> Event Thank You Email/Text</p>	<p><input type="checkbox"/> Birthday &amp; Home Anniv. Cards <input type="checkbox"/> Holiday Cards <input type="checkbox"/> Event Thank You</p>		
<p><b>October</b></p> <p><input type="checkbox"/> Merry Christmas <input type="checkbox"/> Happy Holidays <input type="checkbox"/> Event Thank You</p>	<p><input type="checkbox"/> Happy Holidays <input type="checkbox"/> Schedule Client Annual Review <input type="checkbox"/> Event Thank You Email/Text</p>	<p><input type="checkbox"/> Birthday &amp; Home Anniv. Cards <input type="checkbox"/> Holiday Cards <input type="checkbox"/> Event Thank You</p>		
<p><b>November</b></p> <p><input type="checkbox"/> Merry Christmas <input type="checkbox"/> Happy Holidays <input type="checkbox"/> Event Thank You</p>	<p><input type="checkbox"/> Happy Holidays <input type="checkbox"/> Schedule Client Annual Review <input type="checkbox"/> Event Thank You Email/Text</p>	<p><input type="checkbox"/> Birthday &amp; Home Anniv. Cards <input type="checkbox"/> Holiday Cards <input type="checkbox"/> Event Thank You</p>		
<p><b>December</b></p> <p><input type="checkbox"/> Merry Christmas <input type="checkbox"/> Happy Holidays <input type="checkbox"/> Event Thank You</p>	<p><input type="checkbox"/> Happy Holidays <input type="checkbox"/> Schedule Client Annual Review <input type="checkbox"/> Event Thank You Email/Text</p>	<p><input type="checkbox"/> Birthday &amp; Home Anniv. Cards <input type="checkbox"/> Holiday Cards <input type="checkbox"/> Event Thank You</p>		