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Month 1 Playbook

welcome

Real estate marketing can feel overwhelming.
There are endless ideas, platforms, and opinions about what you “should” be doing.

If you’re like most agents, you don’t struggle with a lack of ideas. You struggle because you’re busy taking care of your clients, and content creation in the middle of plumbing emergencies doesn’t always feel like the top priority.

That’s where Ruby Key comes in.

This playbook is designed to help you make the most of the resources included in your monthly drop. Inside, you’ll find simple ways to use the templates, prompts, and engagement ideas so you can stay visible, connect with your audience, and build a recognizable brand without spending hours figuring out what to do next.

Think of it as your monthly marketing shortcut.

You don’t have to do it all. The goal is to help you choose the strategies that fit your schedule, your personality, and the kind of business you want to build.

Small, consistent actions over time build recognition, trust, and opportunity.
And that’s exactly what this system is designed to help you do.



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The Program

Each Ruby Key drop includes a set of tools designed to support you online and off. The following pages will help you use each tool and manage your time effectively.

INSIDE EACH DROP

- **Monthly Playbook:** Your roadmap for the month
- **Social Media Posts, Scripts + Prompts (5x/week):** 22 days of content ideas, scripts, and captions
- **5 Social Media Feed Templates:** Ready-to-use graphics for social media
- **Client Engagement Ideas:** Simple ways to stay connected to your database
- **Pop-By Template + Idea Guide:** A client touch complete with instructions, shopping guide, and printables

HOW TO USE THE PROGRAM

Before you jump into the content, spend 15 minutes creating your plan for the month.

Step 1 • Review Your Resources: Look through the playbook, social prompts, templates, engagement ideas, and pop-by plan so you know what's available.

Step 2 • Choose Your Focus: Decide which activities fit your goals, schedule, and budget this month. **Always include the newsletter & at least 2 posts/wk on social*

Step 3 • Create a Plan: Schedule a batch day to customize and schedule content, order supplies, and prepare engagement activities. Then, block off time on your calendar for chosen activities (scheduling detail on the next page).

Step 4 • Work the Plan: Consistency beats intensity. Use the tools you've selected, follow the plan you've created, and focus on showing up consistently.

RUBY KEY IS DESIGNED TO BUILD MOMENTUM.

Each monthly drop adds new tools to your marketing library. As the months go on, you'll spend less time creating from scratch and more time focused on being a great agent.

That's why Month 1 may feel simple. We're helping you build a foundation that will compound into tangible results.

Top agents aren't necessarily the most creative or busiest. They're the ones who keep showing up month after month.



10-Hour Marketing Plan

With the Ruby Key system, most agents can stay consistently visible in about 10 hours per month.

Batch Day (8 Hours)

At the beginning of the month, set aside 4-5 hours to prepare your marketing.

- Review the new Ruby Key content
- Customize templates and graphics
- Schedule at least 2 social posts per week
- Edit and schedule your newsletter
- Plan your pop-by and engagement activities

Weekly Marketing Block (1- 1.5 hours)

Spend one hour each week staying visible and connected.

- Post 2-3 additional social posts using prompts, photos, and videos from your week
- Engage with comments, messages, and followers
- Complete planned client touches

If Life Feels Too Busy for Marketing.

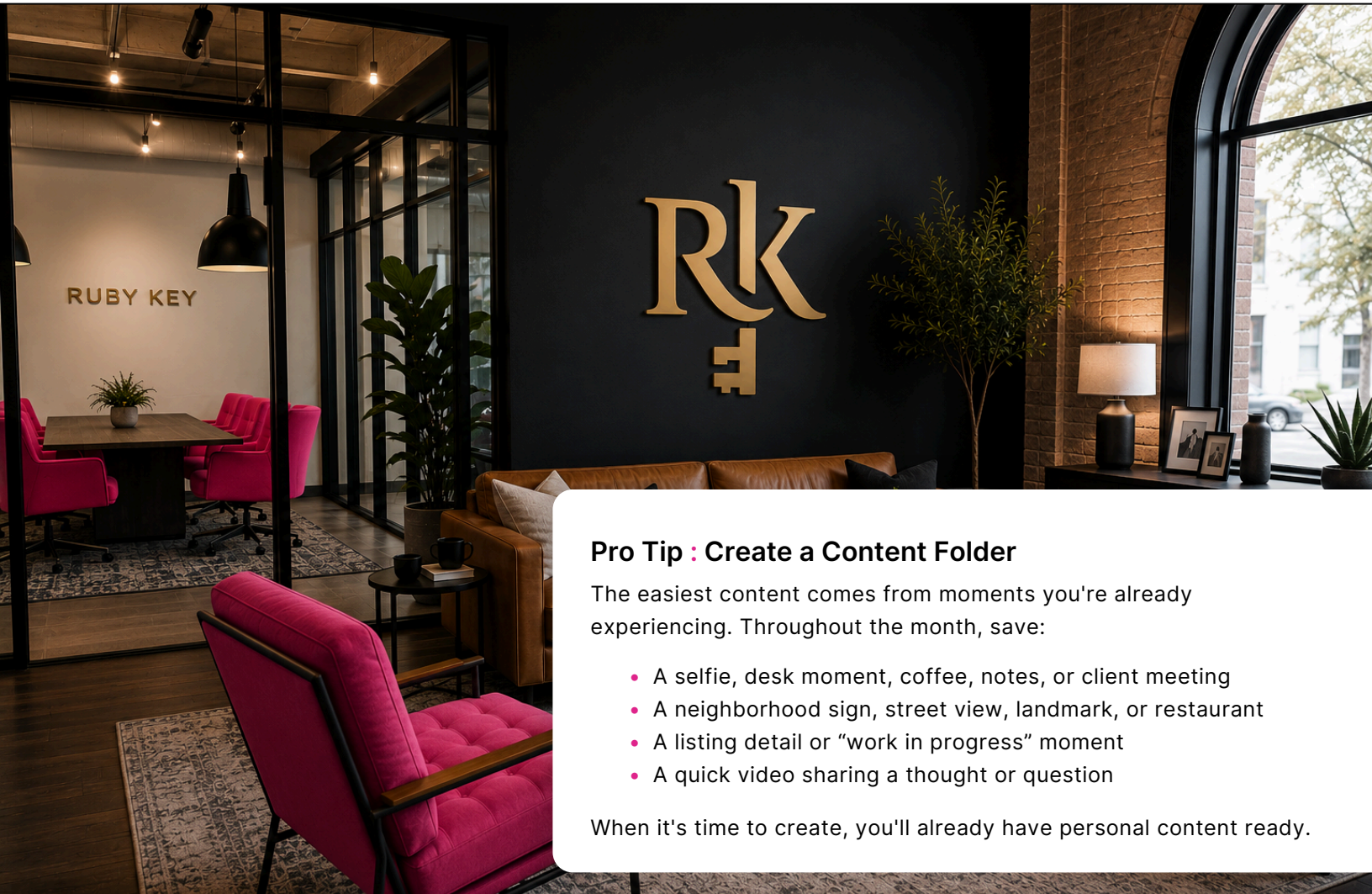
Don't try to do everything. Focus on the activities with the biggest impact:

- Keep your monthly batch day on the calendar
- Send your newsletter each month
- Preschedule at least 2 post/wk on social media
- Use small pockets of time to make calls and engage online

Why This Works

Marketing doesn't fail because agents don't know what to do. It fails because they try to do too much.

We give you simple, repeatable actions that create real momentum.



Pro Tip : Create a Content Folder

The easiest content comes from moments you're already experiencing. Throughout the month, save:

- A selfie, desk moment, coffee, notes, or client meeting
- A neighborhood sign, street view, landmark, or restaurant
- A listing detail or "work in progress" moment
- A quick video sharing a thought or question

When it's time to create, you'll already have personal content ready.





Your Social Plan

The goal isn't to post every day.

The goal is to stay visible, build trust, and remain top of mind.

Weekly Goal: At least 2–4 posts a week

Aim for a mix of:

- **Real Estate:** Listings, market insights, and tips
- **Community:** Local businesses, neighborhoods, events, + thoughts
- **Personal Brand:** Your personality, experiences, and everyday life

Your Simple Posting Formula

To stay consistent (even when it's busy), use a two-part approach:

- **Batch Day Content:** Schedule these at the beginning of the month
→ 2 posts per week from Ruby Key templates and content
- **Weekly Check-In Content:** Add these throughout the month:
→ 1-2 posts from photos, videos, stories, or real moments

That's it.

2 scheduled posts + 1-2 real-life posts = consistent social media

Content Library

Below you'll find links to all of your social media deliverables.

→ [PROMPTS](#)

Social Media Templates:

→ [MARKET UPDATE](#)

→ [PRICE COMPARE](#)

→ [DEFINITION](#)

→ [FAQ](#)

Month 1 Bonus Social Media Templates

→ [COMING SOON](#)

→ [JUST LISTED](#)

→ [UNDER CONTRACT](#)

→ [JUST SOLD](#)

✓ **You are responsible** for ensuring you follow MLS guidelines as well as fair housing, copyright, and social media regulations. Ruby Key takes **no responsibility** for fines, violations, etc., according to our Terms and Conditions.

✓ **Don't Forget Legal Guidelines:** Always have permission to share photos of people or properties and avoid discriminatory language.



Pop-by Guide

Pop-bys are designed to give you a simple reason to reconnect with past clients and stay top of mind.

Step 1: Customize + Print

Edit your selected tag, print on cardstock, and cut.

Step 2: Pick a Gift (or Keep It Simple)

Each pop-by is designed to work with a variety of options. **Here are a few ideas for month 1:**

- Local baker or Crumbl (\$3 - \$5+ each)
- Logo Macarons (\$100/36 - about \$3 each): [Link](#)
*note: this one will also require getting boxes
- Small Nabisco Packs (Oreo, Chips Ahoy, etc)
30 for \$13 on Amazon: [Link](#)
Note: This works great for open houses or events

Step 3: Put It All Together

Attach your tags to your chosen gift using ribbon or twine. Use a hole punch or stapler when appropriate.

Step 4: Delivery Ideas

This month we recommend:

- Clients who bought or sold within the last 3-6 months
- Recent referrals
- Past clients you haven't connected with recently
- Open house visitors or prospects

Why We Include Pop-Bys

Not every client sees your social media or emails. Pop-bys create a personal touchpoint that starts conversations and strengthens relationships in a memorable way. Remember: the goal isn't the gift. The goal is the relationship.

Asset

→ [TAG TEMPLATE](#)



Bonus: Call to Win

Want an easy reason to reconnect with your database?

A Call to Win creates conversations naturally. Instead of chasing people, you're giving them a reason to reach out, update their information, and stay connected.

Step 1: Choose Your Prize

Pick something your clients would genuinely enjoy. Such as:

- Local Gift Card
- Home Improvement Gift Card
- Family Activity Package
- Popular tech gift

Step 2: Set Your Parameters

Choose your date, call window, and rules. Examples:

- June 10th from Noon - 5 PM
- Receive an extra entry for every referral

Step 3: Promote It

Customize the included graphic and share it:

- Social media posts
- Instagram/Facebook Stories
- Text Messages
- Personal Outreach

This program only works with promotion! The more places people see it, the higher your participation will be.

Step 4: Answer Calls & Update Your Database

As people call, verify contact information, including:

- Phone Number
- Email Address
- Mailing address

Then, use the opportunity to catch up! Conversation starters:

- How's the house treating you?
- Any real estate goals this year?
- Need recommendations for any home projects?
- Any vacation plans coming up?
- Did you hear about this amazing new business?

Keep it conversational and just genuinely check-ins.

Step 5: Draw a Winner

Choose a winner at random and let them know.

Consider sharing a quick photo or social post to close the loop and build excitement for future giveaways.

Assets + Tools

→ [SOCIAL GRAPHIC](#)

→ [GIVEAWAY RULES, GUIDELINES + FACTS](#)





The Sell Now Strategy

This is one of the most valuable tools in your Ruby Key system because it helps you turn conversations into future opportunities.

Most agents only know about the people who need to move right now.

The Sell Now Strategy helps you identify the people who may move in six months, one year, or even several years. By gathering information about their future plans, dream home goals, timing, and motivations, you begin building a database before they ever become active leads.

Instead of waiting for people to raise their hand, you're connecting the dots and creating opportunities.

How the Strategy Works

The Sell Now Strategy combines three simple tools:

The Scripts

Use the included conversation starters during check-in calls, follow-ups, client events, or everyday conversations.

Choose the version that best fits the situation, keep it conversational, and make it your own.

The goal isn't to sell, it's to learn and provide a service.

The Graphics

Use the included graphics on social media, in stories, or through direct outreach to spark curiosity and start conversations.

These often uncover people who are thinking about their next move long before they're ready to talk.

The Spreadsheet

Track every useful detail you gather, including names, contact information, timing, price points, must-haves, and notes. This is where the strategy really starts to work. Over time, your spreadsheet becomes a private database of real opportunities you can revisit, nurture, and match together.

Assets

→ [PHONE SCRIPT](#)

→ [TRACKING GUIDE](#)

→ [SPREADSHEET](#)

→ [SELL NOW GRAPHIC](#)

→ [IDEAL HOME GRAPHIC](#)



Newsletter

The newsletter is one of the simplest ways to stay visible with your database. Even if someone doesn't open every email, consistently showing up in their inbox helps keep your name top of mind. Each month, you'll receive three ready-to-use newsletter sections. We've included a few additional templates for launch.

Getting Started

Each section is delivered in Canva so you can easily edit, customize, and download.

Step 1: Choose Your Template

Open the Canva link to each section of the newsletter. Decide which of the 3 design options you're going to use and delete the others.

Step 2: Customize

Update the intro, swap photos, add local information, or use the content exactly as provided.

Or, skip this step and download each section as is.

Step 3: Upload + Send

Take each section that you've downloaded and upload it to your email platform.

From there, add your subject line, recipients, and send or schedule it to go out at a specific time.

Bonus Templates

Month 1 has two bonus templates, including a market update and events option. Save these and use them monthly if you'd like. These help your newsletter feel more personal and local.

Why This Works

Most agents don't stay in touch because they don't know what to say or they don't have the time to figure it out.

These sections give you a simple way to show up with value, stay relevant, and keep your name in front of your clients... without overthinking it.

Assets

- [Tradeoffs in Real Estate](#)
- [Home Value Factors](#)
- [Sell Now Number](#)
- [Bonus: Market Update](#)
- [Bonus: Events](#)





Month 1 Bonus Items

Gift Templates

When to Use It: Anytime you want to add a thoughtful, branded touch to a client gift or follow-up

How to Use It:

- Customize the thank you card, home anniversary card, or printable wine label
- Print professionally or at home, depending on the piece
- Mail or deliver to clients as appropriate

What It Does

Helps you create seamless, polished, thoughtful client touches that feel personal

- [HOME-IVERSARY CARD](#)
- [BIRTHDAY CARD](#)
- [THANK YOU CARD](#)
- [WINE LABELS](#)

Goal Planning Cheat Sheet

When to Use It: Your first month with Ruby Key

How to Use It:

- Start with your current numbers so you know your baseline
- Map out your 1-year goals and what they require financially
- Track both in the spreadsheet
- Then zoom out and define your 3-year vision and the bigger life and business goals you're building toward

What It Does

Helps you connect your business goals to the life you want, so your marketing has a clear purpose.

- [WORKBOOK](#)

Additional Resources

Want to know more? These resources are for those who want to dig deeper into branding, social media dos and don'ts, and so much more!

- [SOCIAL MEDIA DOS AND DON'TS](#)
- [MARKETING TIPS](#)
- [BRANDING + PERSONAL BRANDING 101](#)





Month 1 Asset Links

Below are the links to all of your assets for the month. Steps:

- Click the template link → Each link will open in Canva
- Select "Use Template" or "Make a Copy" → Rename the file and save it

SOCIAL MEDIA

Each template includes three design options. Choose the style that best fits your brand and delete the rest.

- [Prompts](#)
- [City By The Number](#)
- [Definition](#)
- [Market Update](#)
- [Fill in the Blank](#)
- [FAQ](#)

Bonus Listing Templates

- [Coming Soon](#)
- [Under Contract](#)
- [Just Listed](#)
- [Sold](#)

POP BY

Each pop-by plan includes tips and gift ideas in the playbook. The template includes 3 design options.

- [Link](#)

CALL TO WIN GIVEAWAY

Choose your style, customize the templates, and launch. Limit to 2-3x per year max

- [Graphic](#)

NEWSLETTER

Edit and download each section to create a well-rounded monthly newsletter.

- [Real Estate Tradeoffs](#)
- [Home Value Factors](#)
- [Sell Now Number](#)
- [Bonus: Market Update](#)
- [Bonus: Event Template](#)

BONUS: SELL NOW CAMPAIGN

The Sell Now campaign gives you an authentic way to start conversations.

- [Phone Script](#)
- [Tracking Guide](#)
- [Spreadsheet](#)
- [Sell Now Graphic](#)
- [Ideal Home Graphic](#)

BONUS: CUSTOM CARDS + TAGS

Custom gifts + cards printable templates

- [Thank You Card](#)
- [Homeiversary Card](#)
- [Birthday Card](#)
- [Wine Gift Tags](#)

BONUS: GOAL SETTING

- [By the Numbers](#)

