12-Month Past-Client Touch Plan

Past clients already know you and trust you, and some of them know someone who is about to buy or sell. The hard part is staying in touch without it depending on your memory. This plan gives you one small touch a month, plus two that follow each client's own dates. Every touch is meant to be useful or personal, and none of them asks for anything except the two referral asks, which are spaced six months apart. Adapt the wording to your market and to the person; a real sentence beats a polished template.

Month	Touch	Channel	Example line
January	New-year check-in	Call	"Happy new year. How did the house do through the holidays? Anything you're planning to tackle this year?"
February	Tax-season reminder about closing docs	Email	"If you're pulling papers together for your tax preparer, your closing statement is one they may ask for. Happy to resend a copy if it's gone missing."
March	Spring market update	Email	"Spring listings are starting to come up around you. Here's what sold on your side of town last month and for how much."
April	Referral ask (1 of 2)	Text or in person	"If anyone you know mentions buying or selling this year, I'd be glad to help them the way I helped you."
May	Seasonal home note	Email	"Sharing the short list of contractors my clients have been happy with, in case any summer projects are on the list."
June	Personal check-in	Text	"Thinking of you this week. Did the deck project ever happen?"
July	Mid-year neighborhood update	Email	"Halfway through the year: here's what's changed in your neighborhood, including the two sales on your street."
August	Local note	Text or email	"Saw the farmers market is moving closer to you this fall. Thought you'd want to know."
September	Fall maintenance reminder	Text	"Quick reminder before the weather turns: gutters, furnace filter, and the smoke alarm batteries."
October	Referral ask (2 of 2)	Call	"A lot of my clients come from introductions. If a friend is thinking about a move, I'd be grateful if you passed my name along."
November	Home value check, on request	Email	"If you're ever curious what the house would sell for today, I can put together a quick estimate. No reason needed."
December	Holiday card	Mail	A handwritten line in the card, not just a signature: "Hope the first holidays in the new place were good ones."

Two touches that follow their dates, not the calendar

Touch	When and how	Example line
Home anniversary	Text or card, in the month they closed	"One year in the house this month. Hope it's treating you well."
Birthday	Text, on the day	A short message. Not a card from a template; a real sentence.

How to use it

- Pick one day a month, say the first Tuesday, and do that month's touch for everyone in one sitting.
- Batch it: write the message once, then change a line or two for each person so it sounds like you wrote it to them.
- Keep notes on every reply. The renovation, the new job, the sister who is relocating: that detail is what next month's message opens with.
- If a touch falls in the same month as someone's home anniversary or birthday, send the dated one and skip the other.

The Librarian can hold these reminders and draft each message from what you've told it about the client. It sits on top of the tools you already use, like your contacts, CRM, inbox and calendar.