

Take More Listings Now

“Referral Relationships that Create Consistent
Referrals”

Your Coaches

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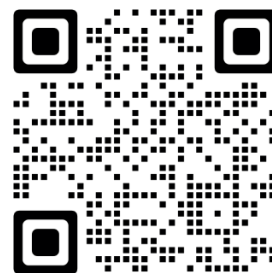
Emily Baker

Please reach out if you have questions regarding the content of the course. If you have administrative questions about your client portal, billing or access, please reach out to fasttrack@kw.com or (512) 439-8684.

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2. Only paid participants may listen and contribute.
3. To ask a question you may type your questions into the “Questions” Box.
4. If you would like to speak on the call, click on the hand icon located on your dashboard and the coach will call on you when possible.
5. Complete all assignments prior to call.
6. Be PREPARED!

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opportunities!**



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TODAY'S 3 FOUNDATIONAL PIECES:

- 1. Professional Referrals**
- 2. Allied Resources/Vendors**
- 3. 3rd Party Referral Parties**

Professional Referrals

Why Professional Referrals?

- Background:
 - The population is aging. 75% of listings are coming from boomers downsizing, seniors transitioning, and families inheriting property.
 - Estate planning attorneys, CPA's, and financial planners are on the frontlines of these situations.
 - Divorce attorneys are also a great source.
 - Think D's of real estate: Debt, Downsizing, Death, Divorce, Diapers, Deployment, etc.

Professional Referral Systems and Best Practices

- The System:
 - Create a list of 20 professionals from Google or Yelp of Estate planning attorneys, CPA's, Financial Planners.
 - Send the professional email template. For those that don't respond via email follow up with a TCPA-compliant phone call in 2 days. Schedule a reminder in your CRM!
 - Create your Preferred Professionals List for monthly follow ups and client referrals.
 - Tag your Preferred Professionals in your CRM.

Professional Referral Appointment Agenda

- We have buyers who need their services (estate planning)
- Share with them where we see 75% of listings coming from (Boomers downsizing, seniors transitioning, families inheriting properties, Debt)
- Review our 5 Step Plan to help these clients
 - Next Page
- Close for referrals.
 - How many cases a month do you come across?
 - Who do you have right now that could use my help?

5-Step Plan “From Cleanout to Closing” or “Transition”

- **Step 1: INITIAL CONSULTATION:** We will meet with the Sellers (and any relevant family members) and provide a complimentary home evaluation. We will then review the Seller’s timeframes and strategize the best plan of action.
- **Step 2: GETTING ORGANIZED:** Once the timeframes have been determined we will schedule for our professional Home Organizer to meet with the sellers and determine what items they would like to keep in the family.
- **Step 3: TAKING INVENTORY:** After we determine which items the sellers will be keeping in the family our Estate Sale specialist will then work with the sellers on what they would like to sell vs. donate including a free estate appraisal and then schedule the Estate Sale if desired.
- **Step 4: PREPARING THE HOME FOR SALE:** Now that all the personal items have been organized, I will work with any trade services to make any necessary repairs on the property to get the home in “showing” condition.
- **Step 5: MARKETING; SELLING THE HOME:** We will market and sell the home for top dollar and ensure an easy and effortless transition for the Sellers. We will coordinate with the movers, the packers and any other services the Seller may need.

Professional Referral Email Template

Subject: Estate Planning Attorney needed

Hi _____,

My name is _____ and I've been selling real estate here in the area for over ____ years. I've had a lot of clients reaching out recently with estate planning needs and I'm looking to connect with a great Estate Planning Attorney to refer them to. Are you taking on new clients and could we set up a time to chat?

Thanks,

Realtor

Professional Referral Conversation

“Hi _____,

My name is _____ and I've been selling real estate here in the area for over ____ years. I've had a lot of clients reaching out recently with estate planning needs and I'm looking to connect with a great Estate Planning Attorney to refer them to. Are you taking on new clients and could we set up a time to chat? “

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Allied Resources/ Vendors

Allied Resource/Vendors

- Identify Allied Resources/Vendors
 - Have 2-3 Top per Category
 - Check their Google Reviews
 - Ask who they refer their business to and how many they come across per month
 - Be Direct and Set Expectations you're looking for a referral relationship
 - Exchange Google Reviews
- Ensure they are in your CRM
 - Add Allied Resource/Vendor Tag
 - Tag Type of Allied Resource/Vendor
- Add a Smart Plan for consistency in connecting
 - 4 TCPA-compliant Phone Calls
 - 26 Emails
 - 2 Events
 - 4 Promotional Touches
- Track Referrals Given and Received
 - Send a Quarterly Email Recap on referral #'s
 - Follow up Monthly on referrals
 - Utilize for marketing, lead generation, and event Sponsorships

Allied Resource/Vendor List

- Home Inspectors
- Appraisers
- Mortgage Brokers
- Title Companies
- Real Estate Attorneys
- Contractors and Builders
- Builder Site Agents
- Staging Companies
- Photographers/Videographers
- Property Management Companies
- Cleaning Services
- Landscapers
- Home Warranty Providers
- Pest Control Services
- Insurance Agents
- Surveyors
- Interior Designers
- Sign Companies
- Moving Companies
- Utility Companies
- Escrow Companies
- Cleaning Services
- Pool Companies/Maintenance Services
- HVAC Technicians
- Roofing Companies
- Plumbers
- Electricians
- Handyman Services
- Flooring Companies
- Window Installation/Treatment Specialists
- Gutter Cleaning Services
- Security System Providers
- Energy Auditors

- Pest Inspectors
- Home Automation Specialists
- Home Organization Experts
- Architects
- Real Estate Trainers
- Notary Services
- Home Improvement Retailers

3rd Party Referrals

3rd Party Referrals

3rd Party Referral Best Practices:

- Identify Referral Alignment Relationships
- Sign Up and Enroll In Partnerships
- Track #'s on Lead Source ROI Tracker
- Contact Best within first 3-minutes of receiving lead
- Initial Contact Plan
- 8X8 and 36-touch Plans

3rd Party Referrals Opening

Door-knocking-

“Hi there! My name is (name) and I’m with (company), how are you today?”

“Awesome, I received your inquiry on selling your home and was in the area, so I wanted to drop off some information and see when we could schedule a free consultation?”

Calling-

“Hi! Is this (name)?”

“Awesome, I received your inquiry on selling your home and wanted to see when we could schedule a free consultation. Where are you looking to move?”

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3rd Party Referrals Questions for Call Flow

“What's got you moving there?”

“Just out of curiosity, what do you believe is the top dollar in today's market for your home?”

“When was the last time you've got an in-person evaluation of what top dollar is in today's market for your home?”

“If you got a top dollar offer in the next 30-days, what would stop you from making the move?”

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3rd Party Referrals Closing for Appointment

“The first step would be to identify what top dollar is in today’s market. A home’s value is based on 3 things. Location, which you’re in a great location that is highly desired. The real estate market, and the good news for you is we’re still in a strong market. Last, is the condition of the home. We’ve yet to see the interior or features and layout of your home, so we offer a free consultation to start. We’ll walk through the home to see if the interior is a match for our clients, go through your options, and give you specific numbers, such that you gain financial clarity on where your equity stands based on the market, which is extremely important when deciding if a move makes sense, right?”

“I’m actually in your area and available (give 2 options). It typically takes about 45-minutes or depending on questions, which of those times is best for you?”

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3rd Party Referrals Direct Mail Letter

Dear Seller,

I specialize in selling homes just like yours.

I'd like to apply for the job. Please call me at (#) so we can get your home SOLD.

Thank you,

*If your home is currently listed for sale with another agent please do not consider this to be a solicitation.

3rd Party Referrals Text Template Examples

Text Template 1-

“Hi, I’m sorry I missed you. Do you own the property at (their address by chance?” Text

Template 2-

“Hi, I’m sorry I missed you. This is (your name) with (company name). I received your inquiry on selling your home from (source). When can we connect?”

Text Template 3-

“Hi, (name). This is (your name) with (company name). I don’t know if you saw my email yesterday..when can we connect on your home’s value?”

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3rd Party Referrals Direct Message Examples

Direct Message 1-

“Hi, I’m sorry I missed you. Do you own the property at (their address by chance?”

Direct Message 2-

“Hi, I’m sorry I missed you. This is (your name) with (company name). I received your inquiry on selling your home from (source). When can we connect?”

Direct Message 3-

“Hi, (name). This is (your name) with (company name). I don’t know if you saw my email yesterday..when can we connect on your home’s value?”

3rd Party Referrals Email Template

Dear Seller,

I received your inquiry from (source) about selling your home.

I'd like to interview for the job of selling your home for top dollar. I sell homes for x% more and x-days less than the average Realtor in our market area.

In the past year, I've sold # of homes. Here is a link to read reviews of clients who've worked with me and here is the link to my website to check out. I've also attached my resume for your review.

When can I come by and tour your home to discuss next steps?

Thank you,

Take Action NOW

1. **Update Micro Market Tracker**
2. **Identify your Message of the Market this week to Post on Social Media, TCPA-compliant Text to Follow Ups, and use in conversations**
3. **Implement ONE Strategy from today into your business**

NEXT WEEK SESSION -

“DOMINATE PROSPECTING AND TAKE YOUR UNFAIR SHARE

- 1. Expireds**
- 2. FSBO's**
- 3. Door-Knocking**