

Exclusively By Referral

Proactive – Purposeful – Lead Generation & Customer Service

CLARIFY



“You cannot be everything to everyone, but you can be everything to your “TARGET CUSTOMER.”

Cesar Ritz

KEY Success Strategy: Create a proactive – purposeful – forward thinking process

ACTION Step: Calculate ROI based on ... *money* ... *energy* ... *time* ... invested

The *PROCESS*:

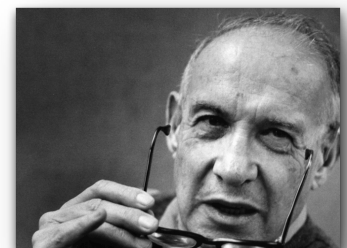
- Step 1 ... define your *product* or *service*
- Step 2 ... identify the most valuable “*target client*”
- Step 3 ... determine *viability* based on *demonstrable* – *objective* criteria
- Step 4 ... Create proactive – purposeful – forward thinking *systems*

FOCUS

KEY Success Strategy: “There is nothing so useless as doing efficiently that which should not be done at all.”

Peter Drucker

ACTION Step: “Outcome Thinking”



- Defines not only what you will do, but also what you ... *will not do*.
 - Knowing what you really want begins with first knowing that which you must give up to get it.
- Is ... *results oriented*
 - Greatest ROI is a function of creating and maintaining a valuable and relevant long-term relationship
- Creates ... *strategic focus*

“That which matters most must never be at the mercy of that which matters least.”
Goethe

PRINCIPLE #1 ... Create new clients through existing clients

- *Raise the issue ... and ... teach them how*

*“Mr. & Mrs. Client ... **I have a favor to ask, but only if you’re comfortable with it.** In the last 5 years selling homes here in Hometown RSA I have discovered that my clients discuss the experience everywhere. They go to work and talk about it, get on the phone and talk to their friends and relatives about it, they walk up and down their street and talk to their neighbors about it and **at least once if not twice** during one of those conversations someone says to them ... you know, I am thinking of buying (or selling) a home, too. When that happens I would like for you to... **stop in the conversation** ... tell them a little about me and why you chose me to be your estate agent ... and, this is the big favor ... again only if you’re comfortable with it ... I want you to tell them to expect a call from me within the next 48 hours. Then with their **permission** I need you to **call me with their name and number so I can make that call.**”*

PRINCIPLE #2 ... Keep the client coming back to do more business

Unique – Compelling – “Value” ... is always – Always – ALWAYS ... determined by the “customer”.

The clients' trust is ***the most precious asset***. Create and implement a “***Service Package***”



The 6 Critical Points

- #1 ... First contact and pre-appointment
- #2 ... First appointment
- #3 ... Marketing (sellers) / Home search (buyers)
- #4 ... Negotiating a contract
- #5 ... Preparing to move
- #6 ... Settlement

At each stage any truly excellent service provider asks the following questions:

- *What is the client **EXPERIENCING** and/or **EXPECTING**?*

Then identify and itemize SPECIFIC TACTICS

- What specifically can be done to **ASSURE THEM** and not only meet their expectations, but **EXCEED** their expectations?

Stage Six

Settlement & First 45-Day Strategy

Day 1	Drop by with something of value
Day 5	Thank You Letter
Day 10	Call to arrange the stop-by
Day 14	Stop-by
Day 15	Personal follow-up note
Day 25 - 30	Change of Address
Day 45	Offer the House Warming Party
Day 60	The A – Client Campaign begins



FLOW ... *Maintain the relationship with on-going VALUABLE and RELEVANT information.*

*THE PRO*gram

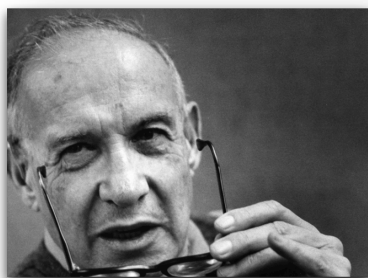
12 Written Contacts

3 Phone Contacts

2 Visits

1 Client Appreciation Event

CONTROL



“If you don’t know specifically what you are going to do differently in the future than what you’ve done in the past it’s not a goal; it’s a fantasy.”

KEY Success Strategy: *Distributive Cognition*

ACTION Step: Create a “MAP”

January	Year End Market Update
February	Ice Cream For Breakfast
March	Tax Tips
April	1st Quarter Market Update
May	Memorial Day
June	1st Day of Summer - Tips
July	Mid Year Market Update
August	Back to School
September	World Literacy - Book Club
October	3rd Quarter Market Update
November	NAR - Home Improvements
December	Holidays

Month _____	
Week 1 2 3 4 (Circle appropriate week)	
Name _____	
Reason for Call	
<input type="checkbox"/> Follow up	<input type="checkbox"/> Birthday/Anniversary
<input type="checkbox"/> Referrals discussed	<input type="checkbox"/> Give away
<input type="checkbox"/> Other _____	
Memo _____	

Name _____	
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Memo _____	

Listing In Progress

Seller Name: _____
 Seller Phone #: _____ (Hm) _____ (Wk)
 Source: _____
 Property Address: _____
 Lot & Block #: _____
 List Price: _____
 MLS #: _____
 Office Case #: _____

Week One

- ☐ Send Thank You to Sellers
- ☐ 10-10-20 completed
- ☐ Add listing to the MLS
- ☐ Property taxes verified: _____
- ☐ Schools verified
 - ☐ Elementary: _____
 - ☐ Middle: _____
 - ☐ Senior: _____
- ☐ Complete listing folder and turn in office copy to processor with the following . . .
 - ☐ Signed listing agreement
 - ☐ Copy of the MLS print out
 - ☐ Mortgage verification letter (with mailing address)
 - ☐ Signed lock box addendum
 - ☐ Signed FYI Sheet

- ☐ Copy of CMA
- ☐ Copy of signed Sellers Estimated Net Sheet
- ☐ Copy of MLS print outs of comparables used, for appraisal package
- ☐ Copy of plat
- ☐ 3 sets of keys
- ☐ 2 sample ads
- ☐ Copy of MLS print out to all agents
- ☐ Place sign on property
- ☐ Arrangements for office tour
- ☐ Make appointment to meet sellers and take photos of home
- ☐ Make up Home Highlights Guide
- ☐ Send out _____ Just Listed Cards (min. 10)
- ☐ Contact "Top Twenty Club"

- ☐
- ☐
- ☐
- ☐

Week Two

- ☐ Place classified ad
- ☐ Send Thank You Cards to follow up 10-10-20
- ☐ Make _____ calls to follow up on week 1 Just Listed Cards
- ☐ Send _____ Just Listed Cards (min. 10)
- ☐ Deliver copy of Home Highlights Guide to all area companies
- ☐ Send Seller a marketing update

- ☐
- ☐
- ☐
- ☐

KEY POINT ...

BECAUSE I KNOW THIS, I WILL ...
