



# **THE SUCCESSFUL REAL ESTATE AGENT**

*More Money. Fewer Hours. Better Clients.*

# INTRODUCTION

As a real estate agent you are actually in the \_\_\_\_\_ business.

## **Some quotes from Gary Keller**

*Founder and chairman of Keller Williams*

“One of the first things I ask when consulting one-on-one with someone who wants to earn more is: ‘Do you have enough leads that if you closed them properly you’d be reaching your goals?’ If they answer ‘No’, I tell them to put everything else on hold and go and get more leads.”

**- The Millionaire Real Estate Agent**

“Let’s face facts. Lead generating to find potential customers just might not be your favorite business subject. If you’re like most, it probably isn’t why you got into real estate and isn’t something that gets you excited to go to work everyday. The truth, however, is that you actually got into two businesses. You got into the helping people with their real estate needs business and you got into the lead generation business. They are inseparable. They are the yin and the yang of your professional world. The bottom line is that without motivated leads there are no people to help. To have sales you must have leads. One begets the other.”

**- Shift**

The best type of lead is a \_\_\_\_\_.

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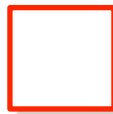
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“People influence people. Nothing influences people more than a recommendation from a trusted friend. A trusted referral influences people more than the best broadcast message. A trusted referral is the Holy Grail of advertising.”

- **Mark Zuckerberg**

Founder and CEO of Facebook

Your average lead:



Most people generate referrals \_\_\_\_\_ because most people think that the only way of getting referrals is by \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_.

Referrals must be generated proactively, and that is done by having a \_\_\_\_\_.

**The good news:** Systems ensure \_\_\_\_\_.

**The bad news:** Systems require \_\_\_\_\_.

A good relationship marketing system...

1. ...is built upon a \_\_\_\_\_ (a deeply held belief about **WHY** things should be done this way).
2. ...gives you a proven \_\_\_\_\_ (it tells you **HOW** to generate a steady stream of referred leads).
3. ...will make maximum use of \_\_\_\_\_ to help you implement the methodology.

# PHILOSOPHY

“In working with several companies who wanted to move from a dependency on company-generated leads to a “referral mindset,” I discovered that the most difficult part of the whole process was just that: the mindset of the salesperson. The methodology is simple; repositioning the salesperson’s thought process turned out to be crucial.”

- **Bob Burg**

From his book *Endless Referrals*

## THE CENTRALITY OF RELATIONSHIPS TO REAL ESTATE SUCCESS

Relationships are the primary \_\_\_\_\_ in a real estate agent’s business.

“For most small businesses, the only distinguishing feature to sell on is relationships. The only competitive advantage we have is the relationship.”

- **Tom Gay**

Founder and Chairman of Refer.com

Most of the time the \_\_\_\_\_ that unlocks the door of opportunity is a relationship.

“Recent research about engagement with clients in the financial services industry and their likelihood to provide new business referrals to their financial advisors brings some startling new and very instructive information to the table. The research work *The Economics of Loyalty* (2011), done by the firm **Advisor Impact - Toronto**, shows that people have an overall willingness to refer their circle of contacts to their financial advisor. There are many reasons for clients saying they are willing to refer, ranging from simply being satisfied with their current advisors, to their desire to reinforce or rationalize their own decision to use their current advisor.

Yet, when the survey further asked clients to give a rating for their feelings on the level of engagement they currently have with their advisor (on a 1-10 scale) the results shifted dramatically. Clients rating their advisor’s engagement level as “excellent” (a rating of 9 or 10) had a 100% history of actually providing referrals to their advisors. Yet when client engagement ratings fell below the excellent level, the history of these clients actually providing advisor referrals plummeted to only 7% or less.

While these findings should send alarm bells across the financial services industry, the message should be important to everyone for whom client & prospect relationships and generating referrals are important for increasing sales and growing their business.”

**-- Published by Refer.com, 2016**

The importance of referrals to my business

(**“Importance Index”**):

How successfully I get referrals from my key relationships

(**“Performance Index”**):

Fruitful relationships don’t happen\_\_\_\_\_.

"All things being equal, people will do business with and refer business to, those people they know, like and trust."

**- Bob Burg (www.burg.com)**  
*The Golden Rule of Networking*

The way to progress a relationship from "know" to "like" to "trust" is through \_\_\_\_\_ contact which adds \_\_\_\_\_ to the other person.

Approaching clients & allied service providers for referrals is a \_\_\_\_\_ thing to do.

Working by referral only suits real estate agents who believe deeply in the \_\_\_\_\_ of their own service.

Do you genuinely believe in your ability to help people successfully sell or buy their home?

**YES** ☐

**NOT SO SURE** ☐

Do you genuinely believe that your level of service is as good as (or superior) to other real estate agents?

**YES** ☐

**NOT SO SURE** ☐

Many top real estate agents work predominantly by referral and enjoy these benefits:

1. Work \_\_\_\_\_ because working by referral takes less time.
2. Are more \_\_\_\_\_ because working by referral is less expensive than traditional marketing strategies.
3. They have a higher \_\_\_\_\_.
4. Tend to have far more career \_\_\_\_\_.

## THE THREE “L’S” OF REAL ESTATE SUCCESS

The Principle:

**20% of your activity produces 80% of your results.**

Hence:

“If you want to make good use of your time, you’ve got to know what’s most important and then give it all you’ve got.”

**- Lee Iacocca,**  
Former CEO of Chrysler

\_\_\_\_\_ all your time on these key ‘20% activities’ will produce astounding growth in your business.

The Three L’s of Real Estate Success (the three key ‘20% activities’)

01 \_\_\_\_\_

02 \_\_\_\_\_

03 \_\_\_\_\_

## **LISTINGS - Why you've got to focus on sellers**

You must devote your lead generation time to securing seller listings / mandates. The virtues of seller listings:

1. Listings provide \_\_\_\_\_ opportunities for your business:
  - a. A sign on their front lawn/pavement
  - b. Directional signage to their house
  - c. Advertisements in the newspaper, on the internet, in publications, etc.
  - d. Direct mail marketing campaigns to your database, a buyers' list, etc.
  - e. "Just listed" card distributions.
  - f. Invitations to home owners in the neighborhood to attend open houses.
  - g. Brochures and posters of all listed properties displayed in your office windows and elsewhere.
2. Like bait attracts fish, \_\_\_\_\_ . Studies show that a properly marketed listing should lead to at least one serious buyer who buys that or another property.
3. You have more \_\_\_\_\_ of your time because sellers generally have less urgency and impatience than buyers.
4. It takes less \_\_\_\_\_ working with sellers than working with buyers.
5. More \_\_\_\_\_. A well leveraged agent should be able to handle 15 - 25 listings per month but only 7 - 8 buyers.
6. Working with mandates gives you a better handle on the \_\_\_\_\_ of the current market.

"Many salespeople fail to grasp the concept of "list to last." They chase after buyers, who are largely disloyal, and fail to prospect for sellers, who sign contracts binding them to the salesperson for six months or more. Go into nearly any real estate office in North America during any kind of market, ask to meet the top producer, and the odds are you'll soon be shaking the hand of someone whose income comes mostly from listing."

**- Matt Williams**

*Why do New Sales Associates Fail? (Realtor®Mag)*



## B. METHODOLOGY

### OVERVIEW

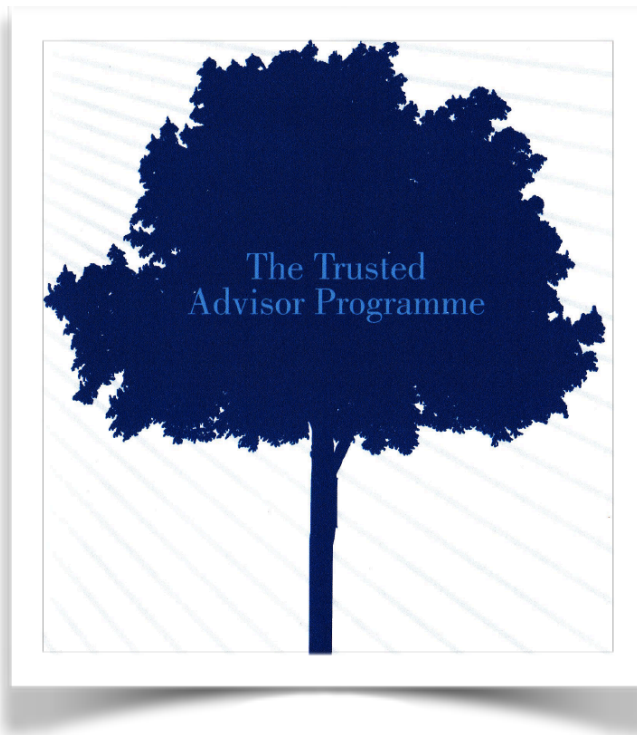
There are two legs upon which any Relationship Marketing System stands:

1. **Service Excellence**



You have to give your clients a reason to talk about you.

2. **A Trusted Advisor Program**



Because building trust with a big enough database requires intentionality, you are going to require a clear, step-by-step strategy to follow.

# THE TRUSTED ADVISOR PROGRAM

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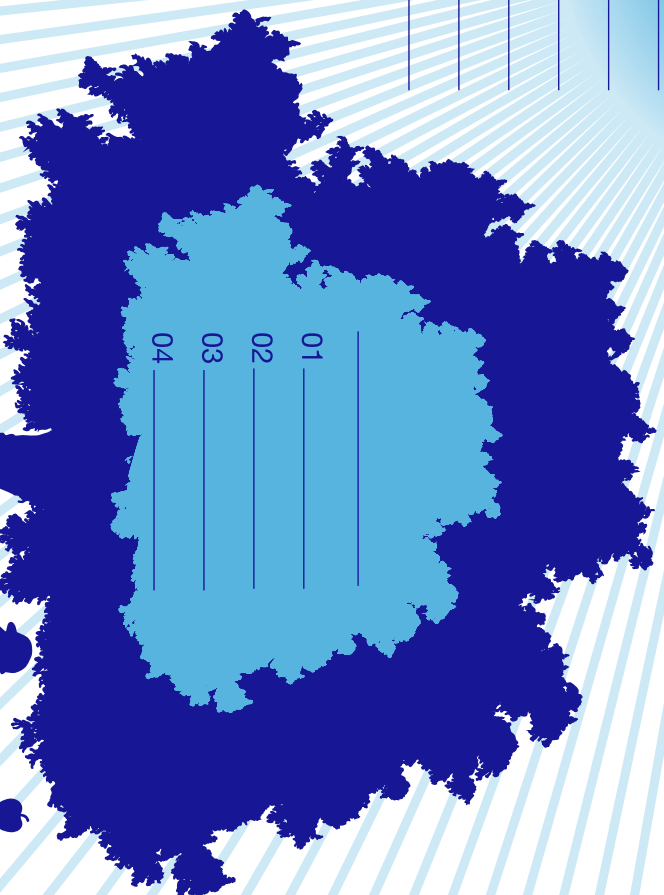
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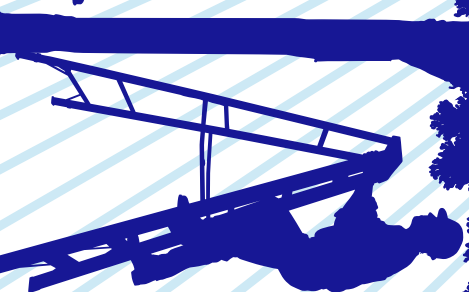
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\_\_\_\_\_ AND \_\_\_\_\_

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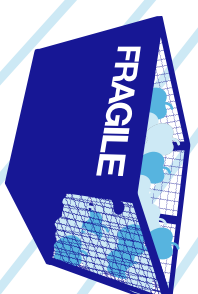
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A \_\_\_\_\_

B \_\_\_\_\_

C \_\_\_\_\_

03 \_\_\_\_\_



# CREATING A RESPONSIVE DATABASE

The first four steps towards creating a responsive database:

01 \_\_\_\_\_

02 \_\_\_\_\_

03 \_\_\_\_\_

04 \_\_\_\_\_

## STEP #1: BUILDING YOUR DATABASE

One of the most fruitful exercises you will ever do in your business is to \_\_\_\_\_  
\_\_\_\_\_ of everyone you know personally. Be sure to include:

1. Current Clients
2. Past Clients
3. Allied Service Providers
4. Personal Contacts

## STEP #2: SORTING YOUR DATABASE

One of the most important lessons to learn is how to \_\_\_\_\_ your relationships  
because the majority of your referrals will come from \_\_\_\_\_ people.

Your goal is to have a \_\_\_\_\_ database, and so once your database is built, you  
must then sort it. It takes courage, and some faith in the system, but understand that:

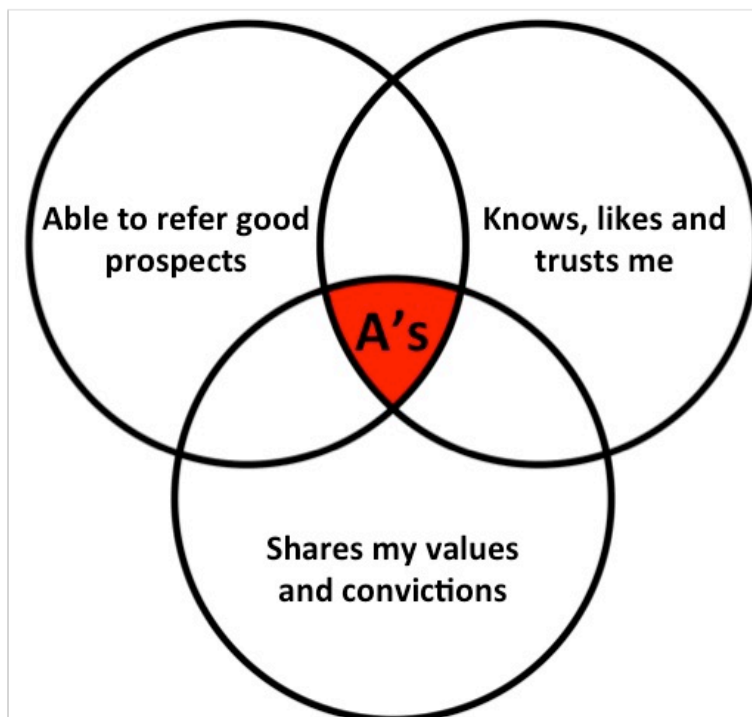
\_\_\_\_\_ **focus and attention on \_\_\_\_\_ people will**  
**produce incredible results for your business.**

Having made your list, your next step is to sort your database into three main  
categories:

1. **A's - Your Advocates:** The people \_\_\_\_\_ to use you themselves and refer you to others. They already know you, like you and trust you. Shoot for 50 people initially. Three questions are helpful to identify your Advocates:
- a. "Who are the people who are able to refer me to good prospects?"
  - b. "Who is already close to knowing, liking and trusting me?"
  - c. "Who is personally aligned with my most deeply held values and convictions?"

"Many people over-focus on individuals who are most transactionally important in the current context, but with whom they may not resonate on a deeper level. If you find yourself in this situation, you'll likely feel like you're constantly trying to fit in rather than naturally being yourself or living your greatest strengths and passions."

**- Michael Simmons**  
*Forbes Magazine (26/02/14)*



2. **B's** - People \_\_\_\_\_ your time and effort in.

## **Maintaining a large database for bulk marketing**

It is absolutely crucial that you have a blog/newsletter that you send out once a month to not only your Advocates but also your “B List”. The content must be valuable and communicate both character and competence.

Your newsletter should be designed to establish you as the trusted expert on all things property related in your area. It should position you as people’s “Trusted Advisor.” It should focus largely on two areas:

1. **The general state of the economy** (including interest rates, financing options and the general state of the property market).
2. **The property market in your area** (including your area’s employment statistics, population growth, household income, transaction volumes, and the increase/decline of home values).

Get proactive about the help you’ll need to send out great content. Then, also include client testimonials (video if possible). Your goal is to get as many people as possible onto this list. When someone is added to this list, drip-feed at least eight introductory “soap opera sequence” e-mails to them within the first month (see **www.dotcomsecrets.com**), after which they are automatically added to the monthly newsletter list.

3. **D’s** – People to be \_\_\_\_\_ from your database.

## **STEP #3: CAPTURING YOUR DATABASE**

When it comes to systematically acquiring clients by referral, \_\_\_\_\_ is crucial for maximising your results. So, after sorting your database, type your Advocates onto a contact management system on your computer. **(For my pick of the best Referral System software, see here: <http://stevenjohnstone.com/p/technology>)**

## **STEP #4: PRIMING YOUR DATABASE**

The next step after building, sorting and capturing your database is to \_\_\_\_\_ through all your Advocates and prime each person using the following dialogue:

**Dialogue #1**  
**The “DATABASE PRIMER” dialogue**  
*‘Priming the pump’ of your database*



*“Mr Jones, the reason for my call is that I’ve recently made a decision to build my business exclusively by referral and part of that means focusing on delivering an exceptional level of service to my **current** clients and also keeping in touch better with my **past** clients. And so what I am trying to do initially is get clear on who it is who **would** actually be happy to refer me. So, can I ask you, if you were buying or selling your home or you had a friend or family member who was, **am I the agent you’d refer them to (would you be happy to refer me?)?**”*

**“Yes, Steven, of course I would!”**

*“Thanks for that, Mr Jones. Your referrals mean a lot to me. I’ll be in touch.”*

**Activity:** Phone through all 50 Advocates within no longer than \_\_\_\_\_ weeks.

**Follow-up:** Send a handwritten note to thank them for pledging their support.

“I know I didn’t reach my goals the past two weeks but I would love to share the results I did get with my 31 phone calls using the Database Primer Dialogue. I got 6 quality referrals which gave me two new developments to sell, 3 residential listings and 1 residential sale. I am thrilled and I can see that the program is really working!”

**- Zanna**  
*Kayramina Properties*

## WORKING WITH ALLIED SERVICE PROVIDERS

One of the most overlooked and most powerful strategies for getting more referrals is to proactively build relationships with Allied Service Providers (ASP's) in order to \_\_\_\_\_'s businesses.

An ASP is simply another business person, not in competition with you, whose products or services are also used by your ideal clients. By working together and promoting each other, both parties can benefit for years to come.

The best way to formalise such relationships is to build a \_\_\_\_\_. This is where the technology solution **'The Referral Card'** can be so useful (see here.

Examples of typical ASP's for real estate agents:

Other Real Estate Agents	Rental Agents	Appraisers
Mortgage lenders	Building contractors	Home stagers
Insurance salespeople	Financial planners	Moving companies
Garden maintenance	Landscapers	Electrical contractors
Plumbers	Attorneys	Security firms
Roofers	Dog walkers	Architects
A handyman	Interior designers	Painters

Using the following questions to help, make a list of at least 5 ASP's you could potentially work more closely with:

1. Who do I already know, like and trust in that industry?
2. Who do I currently refer business to?
3. Who refers business to me?

**My ASP's:**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

Remember the philosophy of working by referral: \_\_\_\_\_ first.

“Once you learn to see opportunities to help other people as investments in your own business, you will be better positioned to maximise your natural flow of referrals.”

**- Jeffrey Scott**

*Author of *The Referral Advantage**

“The best way to get business and get referrals is to give business and give referrals. Continually look for opportunities to refer business whenever you can. Position yourself as a referral source. There is simply no better way to get someone to want to do something for you, than first doing something for them...Networking involves giving to others and helping them succeed in their lives and careers. It's caring about the other person and his wants, needs, and desires. When going about this in a pragmatic and organized fashion—in other words, when following a specific road map or system—you'll find that you get back tenfold what you put out, both personally and professionally.”

**- Bob Burg**

*Endless Referrals*



## **“The Grateful Eight”: Helpful questions for building deeper relationships with ASP’s**

Before you ever try to get business out of an ASP you need to develop their \_\_\_\_\_.

In your initial encounters having the following questions \_\_\_\_\_ will be extremely helpful:

1. How did you first get into the \_\_\_\_\_ industry?
2. What do you enjoy most about your profession?
3. What separates you and your company from the competition?
4. What advice would you give someone just starting out in the \_\_\_\_\_ industry?
5. I’ll bet you’ve seen a lot of change in your industry through the years. What do you see as the next big change?
6. What have been the most effective strategies for marketing your business?
7. What was the biggest decision you ever took in your business, which had the greatest impact on it?
8. How do you want your clients to describe their experience of dealing with you?

### **Where to start**

When you have a core group of ASP’s on your database with whom you have a relatively good relationship, then follow this 6-step process exactly:

**STEP #1:** Call each ASP and use the following dialogue:

*“Hi Ryan, this is \_\_\_\_\_ calling... I just did a course online learning a phenomenal system on how to generate referrals and I thought about how your client acquisition strategy could be enhanced by it too. I’d love to share it with you, and I’ve got a couple of ideas that might benefit both of us. Can you make time for a coffee with me in the next week or so?”*

**STEP #2:** Take that ASP out for coffee and use the \_\_\_\_\_ to teach them the basics of the referral system.

At some point during the meeting ask them the “*Golden Question of Networking*”:

**“How can I know if someone I’m speaking with is a good prospect for you?”**

Then explain the concept of a **Referral Team**:

*“Ryan, I’m serious about getting better at referring high quality leads to you, and over time I’d like to think that you’d do the same, but it’s not just the two of us I have in mind. There are a couple of hand-picked people like you whom I believe in and trust that I’d like to introduce you to, because I think you could benefit from being referred to their clients, and I’d like to suggest we all meet once for lunch to discuss the potential of forming a “Referral Team” type relationship that meets on a more regular basis. Would you be open to that?”*

**STEP #3:** Organise and \_\_\_\_\_ that first “**Referral Team**” meeting. Be sure to:

- Introduce each guest and explain how you know them (include \_\_\_\_\_ you are happy to refer your own clients to them).
- Invite \_\_\_\_\_ person to explain what they do and why they were interested in attending the meeting.
- Discuss the potential of \_\_\_\_\_ the group into a **Referral Team** which \_\_\_\_\_ for breakfast on a regular basis.

**STEP #4:** Follow up with a \_\_\_\_\_ to each of them, and then \_\_\_\_\_ them to assess their desire to join the **Referral Team** formally.

**STEP #5:** Use your **Referral Card™** to send them an invitation to join the **Referral Team**. Then :

- Ensure they each have created a **Referral Card™** of their own.
- Use the **Referral Card™** website to give, receive and track referrals within the group.
- Get the Referral Card™ **FREE**: <http://stevenjohnstone.com/p/tech>

**STEP #6:** Schedule and conduct a \_\_\_\_\_ (at least) recurring **Referral Team** meeting. Top ideas:

- Give each team member an opportunity to discuss their business and their ideal referral at that time.
- Have a formal section of the meeting when members:
  - Exchange referrals
  - Give feedback on previous referrals

The image shows a digital profile for Nick Salinas, a Real Estate Agent at Nick Salinas Group in Houston, TX. The profile is displayed on a blue and white background. On the left, there is a circular headshot of Nick Salinas. Below the photo, his name "Nick Salinas" is written in bold, followed by his title "Real Estate Agent at Nick Salinas Group in Houston, TX". A "Refer Me" button with a right-pointing arrow is located below the title. At the bottom of the blue section, there are icons for phone, email, location, and social media, followed by the text "PHONE" and the number "302-543-2543". On the right, the word "SALINAS" is written in green. Below it, a headline reads "Finding you the home you dream of with the service and experience you need." A "More About Me" button is positioned below the headline. A horizontal menu with four items is shown: "My Services" (with a briefcase icon), "Testimonials" (with a quote icon), "My Team" (with a group of people icon), and "Referred By" (with a speech bubble icon). Below this menu, there are six rounded rectangular buttons arranged in two rows: "First time home buyers", "Move up buyers", "Relocation Services", "New Construction", and "Seller Listing Expertise".

## Explaining to others what you do

When you feel you have earned people's trust, and the time comes for you to speak about your business to them, you must be able to describe your \_\_\_\_\_, and your \_\_\_\_\_, clearly. Don't overlook this principle:

One of the most difficult skills is learning how to tell someone else what it is you do, such that they will know whether or not someone they are speaking with is a good prospect for you.

### 1. Describing your **services**:

- a. Memorise a standard response to the question, "*What do you do for a living?*"
- b. It should be no more than seven seconds in length.
- c. It should contain both features and benefits.
- d. Here's a suggestion: ***"I help people to sell their home for the most amount of money, in the least amount of time, with the least amount of hassle."***

**Take a moment now to craft your first attempt at a "benefit statement":**

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### 2. Describing your **ideal client**:

- a. The more you can isolate a specific group of people in your Advocates' minds, the better.
- b. Here's a suggestion: ***"Anyone in the southern suburbs who is serious about selling their home."***

**Take a moment now to craft your first attempt at an “ideal client description”:**

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- c. When seeking referrals from your database, asking your Advocates a \_\_\_\_\_ is better than simply making a passing comment.

**So...**

*“Mr Jones, do you know anyone in the southern suburbs who is serious about selling their home?”*

**...is better than...**

*“Mr Jones, if you ever know anyone in the southern suburbs who is serious about selling their home please remember to refer me”*

### **Summary statement for ASP strategy**

Supporting other people’s businesses (being a blessing) will change your own business and your life!

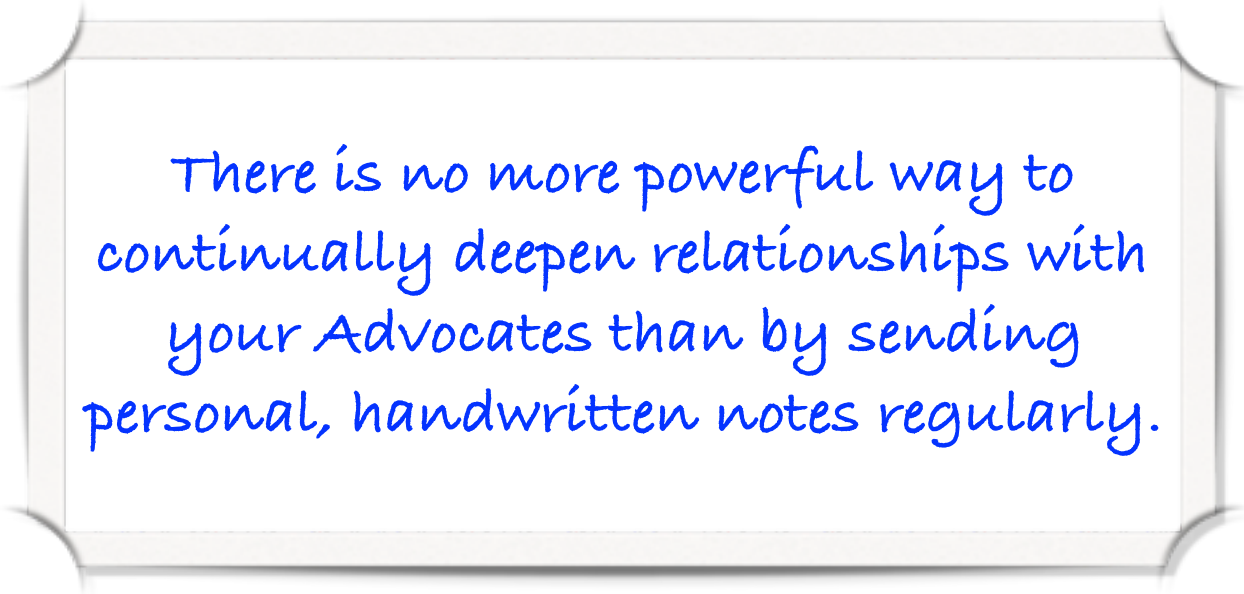
## WRITTEN COMMUNICATION

Regular written communication can be a powerful way to add \_\_\_\_\_ and demonstrate genuine care for the people on your database, while allowing you to communicate your message clearly.

Written communication can also facilitate \_\_\_\_\_ .

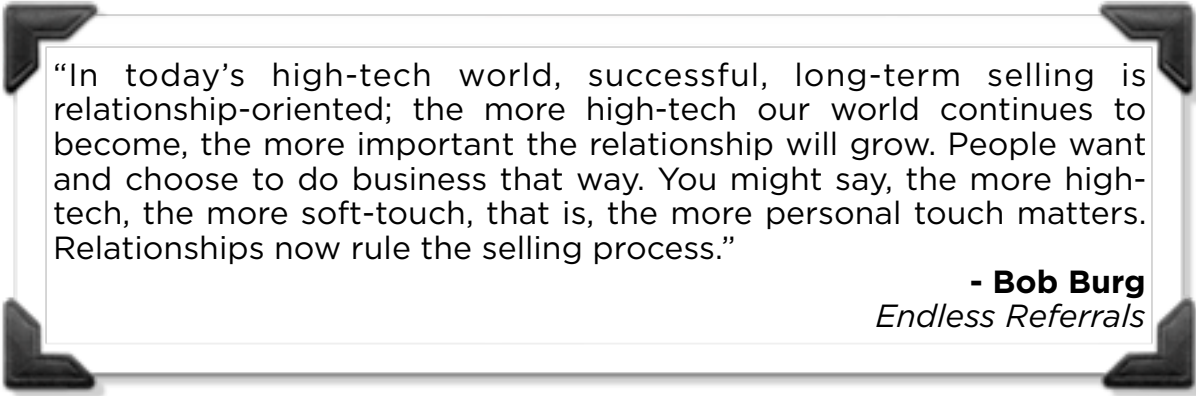
### WRITTEN COMMUNICATION TOOL #2 - HANDWRITTEN NOTES

Understand and apply this simple principle:



There is no more powerful way to continually deepen relationships with your Advocates than by sending personal, handwritten notes regularly.

Don't be fooled into thinking that personal notes are too "old fashioned". They are the epitome of "personal touch". Listen to the sage advice of Bob Berg:



"In today's high-tech world, successful, long-term selling is relationship-oriented; the more high-tech our world continues to become, the more important the relationship will grow. People want and choose to do business that way. You might say, the more high-tech, the more soft-touch, that is, the more personal touch matters. Relationships now rule the selling process."

**- Bob Burg**  
*Endless Referrals*

**Handwritten notes cut through the “cocoons”:**

01 The physical “cocoons”: Handwritten notes are always \_\_\_\_\_.

02 The intellectual “cocoons”: Handwritten notes are always \_\_\_\_\_.

03 The emotional “cocoons”: Handwritten notes always \_\_\_\_\_ people emotionally.

04 The elimination “cocoons”: Handwritten notes are often only thrown away \_\_\_\_\_ after they are received.

To become successful by writing personal notes, write them \_\_\_\_\_.

Each Advocate should receive at least \_\_\_\_\_ personal notes per year.

Then, write a note to people you meet or anyone who does something kind or helpful for you. Just make it a habit of touching people with notes, even if they will never be an Advocate in your database!

One last little quirk: use \_\_\_\_\_ ink.

## WRITTEN COMMUNICATION TOOL #3 - VALUE ITEMS

The cornerstone of your Trusted Advisor Program is to send items of \_\_\_\_\_ value to your Advocates every \_\_\_\_\_.

A Value Item can be a physical gift, but it can also be a emailed link to an article or a video that you feel your Advocate would be interested in. Over time they should demonstrate both \_\_\_\_\_ and \_\_\_\_\_ :

- Competence is communicated by \_\_\_\_\_ value items.
- Character is communicated by \_\_\_\_\_ value items.

Having a \_\_\_\_\_ delivered is always a powerful value item because it displays effort and personal attention, can communicate both character and competence, has great “\_\_\_\_\_” and yet it can be done relatively easily and inexpensively.

### RESEARCHING THE INTERESTS OF YOUR ADVOCATES

To be able to maximise the “value” which your advocates experience from your communications you must research their interests.

You must also have a place where you \_\_\_\_\_ these interests for each Advocate.

To get FREE access to the **Engage** software Steven refers to in the video, go here: <http://stevenjohnstone.com/p/technology>

**NOTE:** In addition to the value items, also include your Advocates in your monthly newsletter. The newsletter may even function as the Value Item from time to time.



**Key Points if your Value Item is being sent via e-mail:**

- Keep it brief and sincere.
- Attach a Value Item that *does* actually relate to your contacts' interests!
- Alternate between professional items and personal items (in your tracking tool, record what Value Item each Advocate receives).
- Make it clear that the article was selected specifically for them (Include language like, "I saw this article and you came to mind..." or, "Thought you would enjoy reading this ...")
- Don't ask for a response, it's simply a gift from you to them.

Together with your newsletter, Value Items form the \_\_\_\_\_ of your Trusted Advisor Program. They create a wonderful talking point off which everything else can operate.

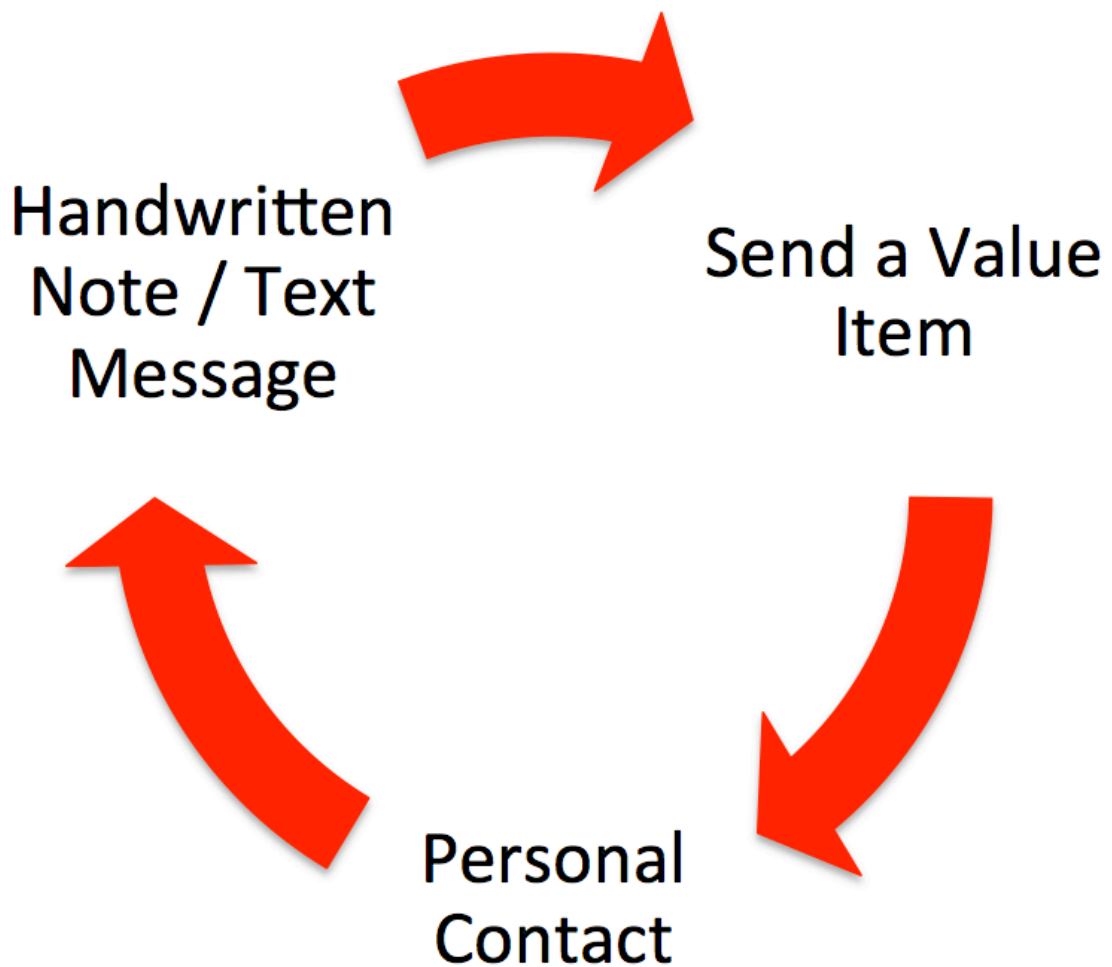
Excluding your newsletter, each Advocate should receive at least \_\_\_\_\_ Value Items per year (approximately every 6 weeks).

**FOLLOW UP**

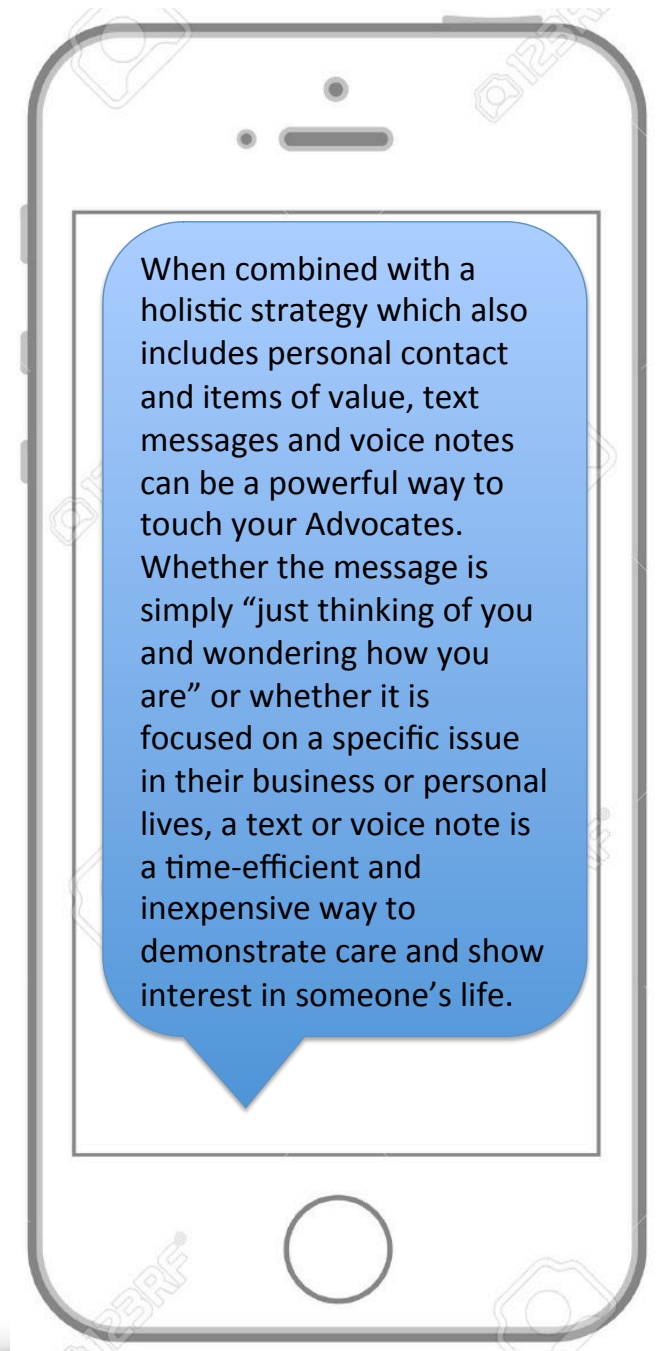
The following formula must be followed every 6-week cycle after your Value Item is sent:

1. Two weeks later make a follow up \_\_\_\_\_ or \_\_\_\_\_ - \_\_\_\_ / \_\_\_\_\_.
2. Then, send them a \_\_\_\_\_ or a \_\_\_\_\_.

# The Basic 6-Week Cycle of your Trusted Advisor Program



## WRITTEN COMMUNICATION TOOL #4 - TEXT / VOICE MESSAGES



Each Advocate should receive at least \_\_\_\_\_ texts or voice notes per year.

## RESPONDING TO REFERRALS

You have four main tasks after receiving a referral:

- A. \_\_\_\_\_ people \_\_\_\_\_ to refer you.
- B. \_\_\_\_\_ them for referring you.
- C. “\_\_\_\_\_ - \_\_\_\_\_” their referral (if at all possible).
- D. \_\_\_\_\_ to them after referring you.

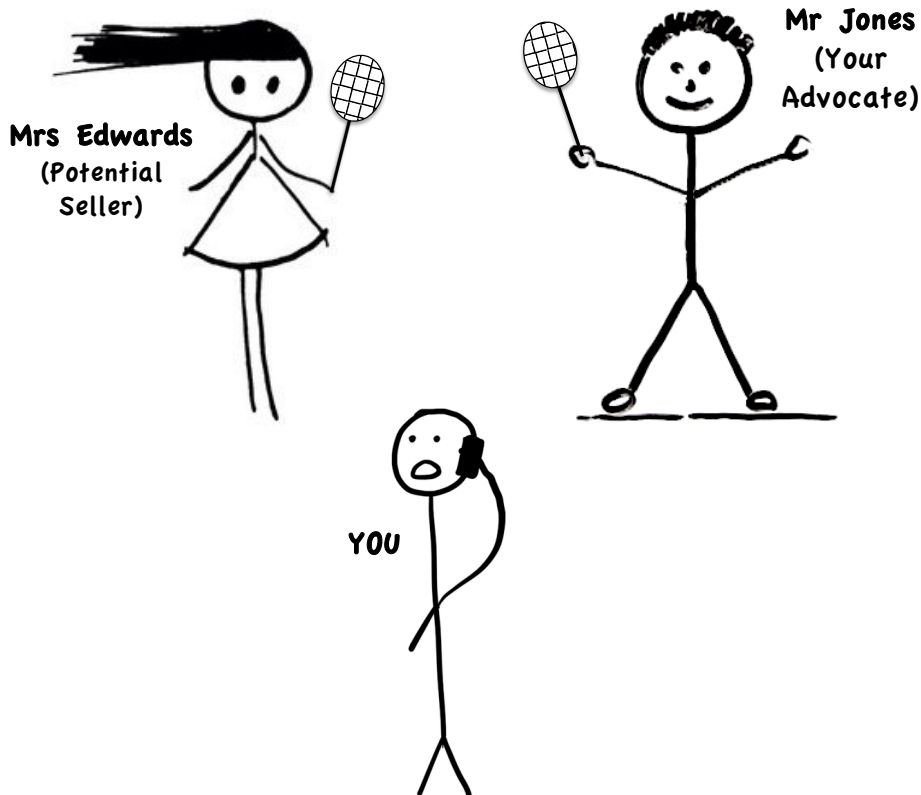
### A. Teaching people how to refer you

**THE PRINCIPLE:** Once you have received a lead via referral, making contact and “getting to the table” is all that counts. You must be obsessed with getting face-to-face appointments with your leads.

“The only purpose in finding a lead is landing an appointment. It’s all about getting to the table. . . . National Association of REALTORS® (NAR®) research over the years has consistently communicated that the real competition in real estate is getting to the table—not at it. Their revealing statistics show that approximately two-thirds of all buyers and sellers only interview one agent and approximately half of the remainder only interview two. Getting to the table first or second is what matters. And this makes conversion more important than presentation. The competitive battle is almost single-handedly won simply by getting an appointment before someone else does. The number one challenge you face after you’ve encountered a lead opportunity is not making a winning presentation—it’s winning the appointment.”

**- Gary Keller**  
*Shift*

Let's meet three great people:



**Principle #1:** For a referral to be any good at all, Mr Jones must \_\_\_\_\_ that Mrs Edwards is thinking of selling. This is achieved through the “Harvester Dialogue”.

**Principle #2:** For a referral to be any good at all you must make sure your Advocate has spoken to the person about you. Mrs Edwards must be \_\_\_\_\_ your call. This can be achieved by using the following dialogue...



### **Dialogue #2** **The LEAD WARMER dialogue**

*“Mr Jones, thanks so much for the referral to Mrs Edwards, I really do appreciate it. Could I ask you a favor? It really does make my job a lot easier if she is expecting my call, so would you mind letting her know that I’ll be calling? Thanks, Mr Jones. Again, I really do appreciate your referrals.”*

Once you are sure this has happened do not \_\_\_\_\_ contacting the prospect! You MUST get an appointment. Find a dialogue that works for you. Role play it constantly.

### Securing appointments - a rough approach



*Mrs Edwards, my name is ... I am with (company name). Your (friend) Mr Jones asked me to give you a call because you may be thinking of selling your home. Is that correct? ... Great. Mrs Edwards, the purpose for my call is to learn more about what it is you want to do and then to schedule a time for me to come and see you. Do you mind if I ask you a couple of quick questions? ...(qualifying Q's) ... Thank you so much...*

- 1. Would you mind telling me a bit about yourself (family, age, job, pets, etc)?*
- 2. Why exactly are you thinking of (buying, selling)?*
- 3. Where would you like to move to / where are you moving from and do you have a house you need to sell?*
- 4. Ideally, by when would you like this to happen?*
- 5. What do you think your home is worth? It's important for me to just get a frame of reference of what you're thinking, ball park? ... Great, I'll do all the research necessary before we meet so that I can give you a market related valuation when I see you.*
- 6. Would you mind if I asked, who are the other decision makers?*
- 7. Would you mind telling me what steps you've already taken?*

*OK Great, that'll do for now. When I come and see you we can discuss **more** about exactly what you want, and how I can best help you to get that. Would Tue evening work for you or would Saturday morning be better?*

## B. Rewarding people for referring you

When you receive a referral from a client, reward them \_\_\_\_\_ – do not wait to close the deal first.

Vouchers are good to use because you can \_\_\_\_\_ them.



Other examples of Referral Rewards:

- Write a personal thank you note.
- Send a bouquet of flowers to work or home.
- Deliver a gift basket to work or home.
- Take that person to lunch or dinner.
- Invite them to play golf.
- Send them theatre tickets.
- Provide them with good seats at a sporting event.

## C. Turning the lead into a “Double-Impact Referral”

Something powerful happens when a prospect hears about you from \_\_\_\_\_

\_\_\_\_\_ person. If a single-source referral is a 10/10 then a “Double-Impact Referral” is a 100!

When you have been referred to someone \_\_\_\_\_ your database to see if there is possibly another Advocate who would know this prospect, and if there is, phone them and ask them if they would be willing to \_\_\_\_\_ the referral their friend has already received.

Use the following dialogue...



### Dialogue #3 The "DOUBLE-IMPACT DIALOGUE"

*"Dave, the reason for my call is I need to ask you to do me a favour. You know Mrs Edwards don't you? Great, because she's thinking of selling her home and I would love to help her to do that successfully. I have **already** been referred to her by Mr Jones (so she is expecting my call) **BUT**... I've found in the past that if a potential client that I have been referred to has heard about me from a second person, the process of developing their trust is so much easier. Would you mind just letting her know that I'd mentioned to you that I was going to be contacting her and that from your perspective I'm an agent she can trust?"*

Then reward this Advocate just as you did the first one who referred you.

One other benefit of this strategy is that it \_\_\_\_\_ your second Advocate (Dave Daily-Innes) how much you appreciate referrals, and it shows him that other people are actually referring you already. In this way, in addition to its being a great excuse for another "touch," the process also cultivates the fruitfulness of that second Advocate.



## **D. Providing Referral Feedback**

Always keep your Advocates \_\_\_\_\_ about the progress of your work with those they have referred to you. Use your common sense about how often this needs to happen, and what type of contact to use (WhatsApp, e-mail, phone call, etc.).

There are a number of reasons for doing this:

1. It's just good manners!
2. It will increase the likelihood of their speaking to the prospect again, perhaps helping you close the deal in the weeks following your initial meeting.
3. It reminds your Advocate how much you value his or her referrals.
4. It settles your Advocate's mind about what kind of service you will give to those whom they refer to you in the future.
5. It provides fresh new touch points for conversations which could lead to new referrals. Personal contact generates activity. It is simply unavoidable.

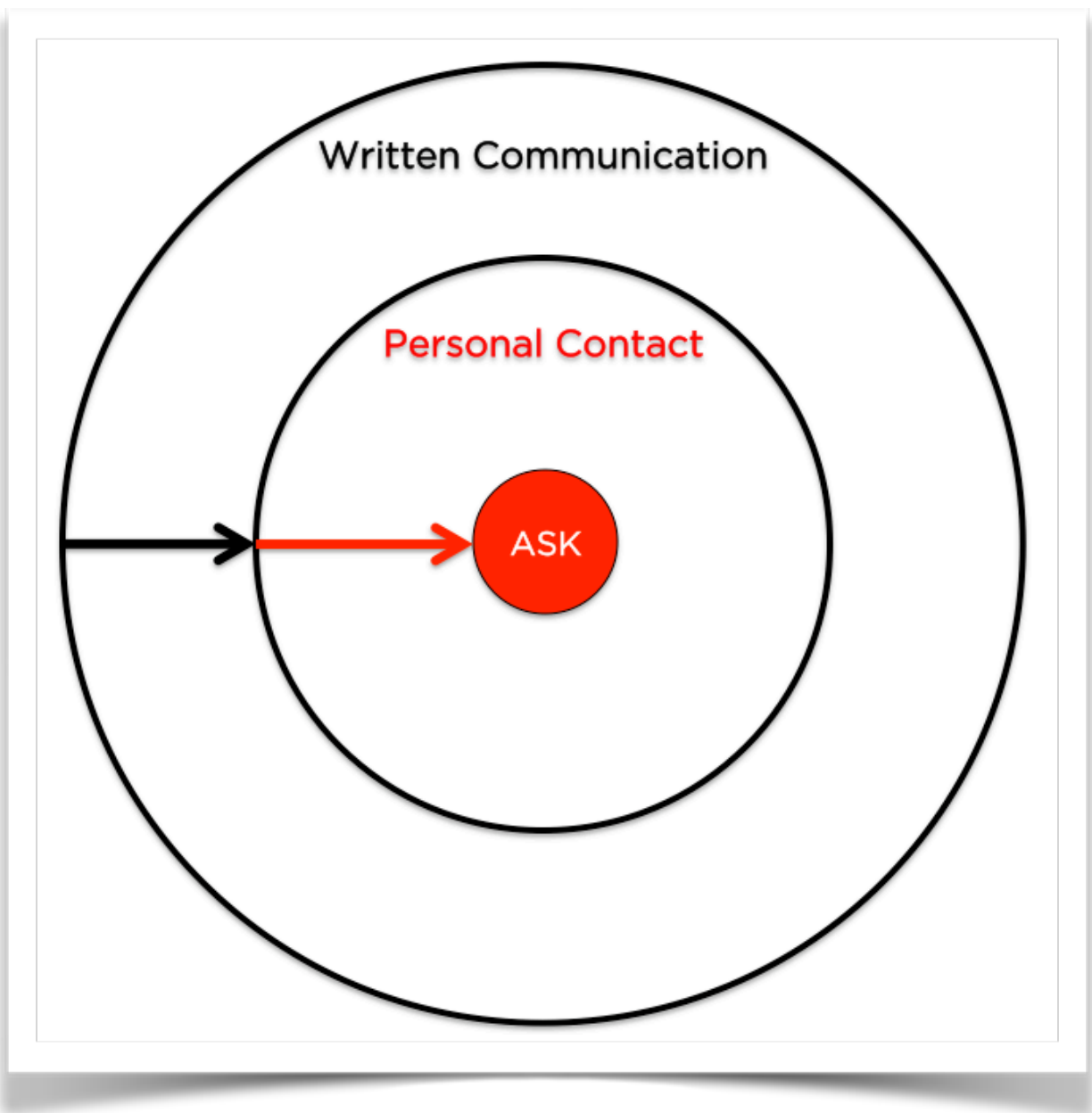
# SCRIPTS AND DIALOGUES

## Introduction to Scripts and Dialogues

Scripts/dialogues are simply about being \_\_\_\_\_.

They achieve the following:

1. Maintain the \_\_\_\_\_ of your message and prevent you from forgetting or neglecting the \_\_\_\_\_ for your contact.



2. Give you \_\_\_\_\_ to make personal contact.

“There are... a number of skills you will need to develop through experience and training to make your lead generation effort truly effective. Foremost of these are the disciplines of sales scripts and dialogues. If you haven’t internalized your scripts and dialogues such that you can face almost any situation with confidence, your lead generation activities will not likely yield the kinds of results we describe here. Confidence is the key. If you know (and I mean really know) your scripts and dialogues, you will feel confident and empowered when you go about the otherwise intimidating business of making or receiving calls... and working with your Allied Resources. The bottom line is that scripts and dialogue proficiency builds confidence and that confidence leads to decisive action.”

**- Gary Keller**

*The Millionaire Real Estate Agent*

The only way to have the ability to deliver a dialogue when in the heat of the moment is to know it ‘\_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_’, and the only way to do that is to practice it over and over!

“Do not become sidetracked by the poor salespeople who have poor delivery. Scripts and dialogues are often knocked because of poor delivery. Tremendously skilled salespeople are well-scripted; you just cannot tell they are speaking from a script. Constant practice makes the difference.”

**- Dirk Zeller**

*Real Estate Champions*

Practicing with a partner is called ‘\_\_\_\_\_ - \_\_\_\_\_’ and is an effective way to learn a dialogue.

Get a \_\_\_\_\_ or a colleague that you can do this with. Build it into your daily routine.

## **Asking For Referrals**

Once people know, like and trust you they will \_\_\_\_\_ to refer you, but a few other things must be in place:

### **For people to refer**

1. They must know what kind of person or opportunity you are looking for.
2. They must be able to express to their circle of influence the value that you provide.
3. They must be reminded (asked) regularly to refer.

## Dialogue #4: The “VALUE DISCUSSION” dialogue

With every **current client** you will want to discuss the value that \_\_\_\_\_ recognise in what you have done for them.

You do this by asking a simple and yet strategic question and then \_\_\_\_\_ as you let them talk.

The exact question you ask will change as the stage of your relationship changes. The question will draw out what value they have found in either the \_\_\_\_\_, the \_\_\_\_\_ or the \_\_\_\_\_.



### Dialogue #4 The “VALUE DISCUSSION”

#### The Meeting:

*“Mrs Edwards, we’ve covered quite a bit of ground together this morning. What to **you** have been the most valuable things we’ve talked about?”*

#### The Process:

*“Mrs Edwards, we’ve been working on this together for a while now, and I just want to stop and take stock for a second. What is the thing that you have most valued so far about **the process** we’ve been going through to get your home sold?”*

#### The Relationship:

*“Mrs Edwards, you’ve been a client for a long time and as you know I like to keep in touch with my past clients because I appreciate our relationship, but I’ve been wanting to ask **you** what it is that you value most about our relationship?”*

**Why do this “Value Discussion”?**

In addition to the many other benefits to you, the reason why you want Mrs Edwards to verbalise what she values about you and your service is that it makes her \_\_\_\_\_ in her own mind, and then put into language, what she is appreciating about your work. This makes her far more likely to \_\_\_\_\_ that value to others.

## Dialogue #5: The CLIENT DUPLICATOR dialogue

Understand this fundamental referral principal:

THE PEOPLE YOU ARE SERVING NOW ARE THE ***MOST LIKELY*** TO REFER YOU ***IMMEDIATELY*** BECAUSE THEY ARE CONSTANTLY THINKING ABOUT YOUR TRANSACTION TOGETHER.

### Your USP

The most important point to communicate to your clients is your Unique Selling Proposition (USP):

**“Working exclusively by referral to serve you better”**

The “**Client Duplicator Dialogue**” is designed to \_\_\_\_\_ your current clients by educating them:

1. How your \_\_\_\_\_ works.
2. How \_\_\_\_\_ work.
3. What you \_\_\_\_\_ from them.
4. How this \_\_\_\_\_ **them.**

In the early stages of your transaction together, at an appropriate moment you will say something along these lines:

## Dialogue #5 The “CLIENT DUPLICATOR” dialogue



### Introduction:

*"Mrs Edwards, now that we're going to be working together it's important to me that you understand how I run my business. Would you mind if I take a minute to explain that to you?"*

### How your industry works:

*"Most real estate agents spend the majority of their marketing time and budget prospecting for new business – things like cold calling, door knocking, advertising, geographic farming, online ads, direct mail, etc."*

### How you work:

*"I try to minimize all of that, because I prefer to build my business as much as possible by referral and rather devote my resources to serving my clients."*

### What you ask of them:

*"All I ask (of all of my clients) is that while I'm working for you, I would love you to refer me to people similar to yourself who are serious about selling their home, and would appreciate the same level of service that I provide."*

### How this benefits them:

*"What that does is, as long as you and my other clients keep referring me, I don't have to go prospecting like every one else, which allows me the time and resources I need to give you the kind of service that I believe you deserve. Does that make sense?"*

Make this a serious, calculated and \_\_\_\_\_ discussion you have with every new and current client!



## Dialogue #6: The HARVESTER dialogue

One of the most common mistakes made by real estate agents is \_\_\_\_\_  
for referrals.

Asking for referrals repeatedly begins to compound over time, creating \_\_\_\_\_  
\_\_\_\_\_ with your Advocates.

### Here is the challenge

It is crucial when asking for referrals to be sincere and confident, but the fact that you have to ask the same people for referrals over-and-over again leaves many real estate agents feeling awkward and so they never ask.

### And here is a great solution...

One of the best ways to consistently ask the same people for referrals (sincerely and confidently) is ask for their \_\_\_\_\_ to do so!

**After launching your referral program, on your second call:** Tell each Advocate in advance that you'd like to ask them for referrals regularly, explain why, and then ask them if this is acceptable to them!

## Dialogue #6a

### The (once-off) set-up for the “HARVESTER” dialogue



*“Mr Jones, you know how I said to you that I’m committed to building my business exclusively by referral?... Well, one of the things that the experts tell us about being able to do that (in any business) is that you’ve got to continually **remind** people to do so, even if they **are** happy to refer you (which you’ve gratefully said that you are). Every referral expert says that if you don’t consistently **ask** for referrals you won’t get them, even if your clients are happy to give them to you. So, at the risk of sounding repetitive, I’m going to listen to the experts and from time to time when we speak I’d like your permission to be able to ask you the following simple question:*

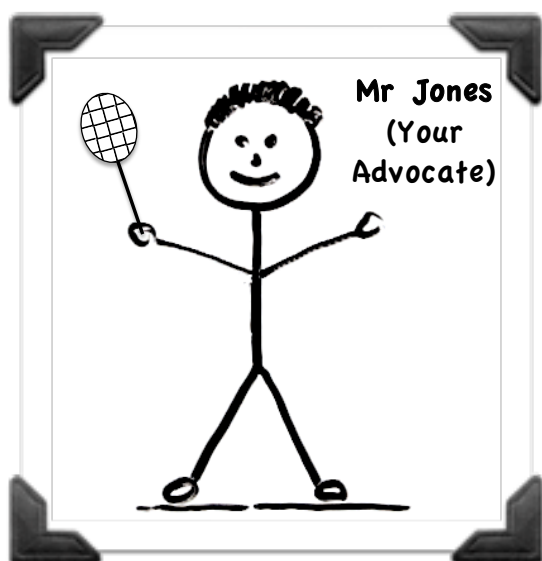
***“Do you know [...anyone in the southern suburbs who is serious about selling their home]?”***

*Is that okay with you – can I get your permission to do that **from time to time**? [wait for an answer! You want them to commit verbally their permission for you to ask them for referrals.]*

*Excellent, Mr Jones, thank you! Most of the time you probably won’t know someone who is, but from time-to-time you might, and when that does happen all I ask is that you would call me with their details so that I can make an appointment with them, and I make you this promise: I will treat anyone you refer to me with the greatest respect and I will give them an exceptional level of service.”*

The genius of this approach is its complete \_\_\_\_\_. Once an Advocate has given you **permission to ask** them for referrals it will never be an \_\_\_\_\_ thing for you ever again!

Then, at the very end of every \_\_\_\_\_ to your Advocates ask for a referral using the “Harvester Dialogue”:



**Dialogue #6b**  
**The “HARVESTER” dialogue**  
(repeat this many times with each Advocate)

*“Nice chatting to you again, Mr Jones, and just before I go I **must** remember to ask you for a referral, so here goes:*

***“Do you know anyone in the southern suburbs who is serious about selling their home?”***

*“Thanks, Mr Jones, and if there is ever anything I can do for you, just let me know.”*

This means you’ll be asking each Advocate for a referral \_\_\_\_\_.

**WHAT TO SAY WHEN SOMEONE ASKS YOU HOW BUSINESS IS**

***“Business is great, thanks! But I’m never too busy for your referrals, because that’s how I run my business.”***

## PERSONAL CONTACT

Always remember the following statistic:

YOU WILL HAVE **SEVEN** TIMES GREATER RESULTS IF YOU FOLLOW UP YOUR WRITTEN COMMUNICATION WITH PERSONAL CONTACT.

Personal contact is like a catalyst in a chemical reaction – it \_\_\_\_\_ the flow of referrals.

Don't be shy – it's worth it!

### PERSONAL CONTACT TOOL #1 – PHONE CALLS

**Harvester phone calls:** Try to call through your entire Advocate list every \_\_\_\_ weeks.

**Follow Up:** Send a text / WhatsApp / voice note.

#### **Top tips:**

- Always have an excuse or reason to justify your phone call (eg. your most recent Value Item).
- Keep it brief and maintain the focus on them (consult notes from previous personal contact to help you do this).
- Just before putting the phone down, **ask for a referral using the Harvester Dialogue!**
- Just after putting the phone down, make a note on their **EngagePro** profile of everything they spoke about.

## PERSONAL CONTACT TOOL #2 – FACE-TO-FACE CONTACT

It is important that you get face-to-face with your Advocates every twelve weeks. There are three main strategies for this:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_.

### **1. DROP-BY'S**

The Drop-By is a \_\_\_\_\_ visit paid to an Advocate and is the most predictable way to \_\_\_\_\_ referrals.

Call beforehand:

*"I'm going to be in your area tomorrow between \_\_\_\_\_ and \_\_\_\_\_ and I'd love to drop-by and see how you're doing..."*

Take a \_\_\_\_\_ with you (branded if you like). Visit for \_\_\_\_\_ minutes. Stay \_\_\_\_\_ the whole time.

**Follow Up:** Send a personal note.

### **Top Tips:**

- Plan your route to make your Drop-By's efficient. Group several together in one outing.
- Just after leaving, make a note on their **Engage** profile of everything they spoke about. For free access to **Engage**, or just to check it out for yourself, go here:

<http://stevenjohnstone.com/p/technology>).

## **2. SUPER-ADVOCATE LUNCHES**

After 12- 24 months of disciplined implementation of your Trusted Advisor Program you should be able to identify \_\_\_\_\_ - \_\_\_\_\_ Advocates who are referring you most of your \_\_\_\_\_ transactions.

Set up a separate database for those Super-Advocates and reward them with your \_\_\_\_\_.

**Activity:** Once every \_\_\_\_\_ weeks, take these Super-Advocates out to lunch. Be sure to listen for something \_\_\_\_\_ that they want or need.

**Follow up:** After your meeting send them a personal note together with a \_\_\_\_\_ that addresses that want or need.

## **3. REFERRAL TEAM MEETINGS**

*See our discussions on pages 14-18.*

## PERSONAL CONTACT TOOL #3 – CLIENT APPRECIATION EVENTS

One of the best ways to create \_\_\_\_\_ in your database is to host a **Client Appreciation Event.**

**Activity:** Host \_\_\_\_\_ client event per year.

Ideas:

- Host a private art showing
- Host a cocktail event with a high profile guest speaker
- Rent a venue with a big screen for major sporting events
- Have a Valentine's Day banquet with a Q&A game for the couples.
- Host a games night
- Host a charitable event
- Have a fancy dress dinner party at your house.
- Seasonal events: Christmas, etc.
- Rent a movie theatre for your own mid-week movie premier.
- Dinner Parties: Select maximum 10 people per month. Have an "anchor guest."
- Organise a wine (or whiskey, or craft beer, etc.) tour or tasting
- ...get creative!

### Using the party to generate referrals immediately

1. On your invitation 4 - 6 weeks in advance, tell your Advocates that you will be having a draw for a great prize. To enter the draw all they have to do is send you a referral. For every referral they send, they'll get one entry into the draw.
2. At the event itself, distribute several "*last minute referral*" cards to each person. Tell the crowd that it's not too late to enter the draw and for every "last minute referral" they hand in they will receive an additional entry.

At some point during the event give your "***As you all know...***" speech:

## **The “As you all know...” speech**

### **- A client party dialogue**

*“What is tonight all about? Well, as you all know, I build my business predominantly by referral. I try to really look after my relationships, I try to keep in touch, I try to add value to people’s lives, and I try always to give my clients the very best service. And if you’re here today it means that you are one of those special people who do support me, and many of you have given me referrals which have led to new clients and new relationships for me. And so today is just a small way for me to say thank you for that. Every time a friend or client refers me to someone that they know I consider it an honor and a responsibility, and that’s why I am deeply committed to taking very good care of the people that you refer to me. So thank you for being here tonight, thank you for your referrals - for supporting my business, and I hope you have a great time.”*



# THE FREQUENCY AND MOMENTUM OF CONTACT

## WHY BUILD CRITICAL MASS

\_\_\_\_\_ % of sellers only ever contact one or two agents.

When asking the question, “Why build critical mass?” the answer is, **“Because market awareness means everything in real estate!”**

“In the battle for real estate consumer mind share, you’re either first or second or you’re out of contention.”

**- Gary Keller**

*The Millionaire Real Estate Agent*

## THE POTENTIAL OF MAINTAINING CRITICAL MASS

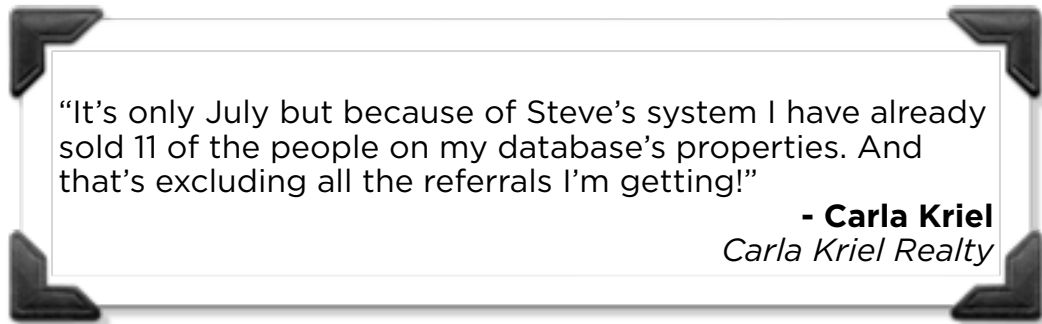
Achieving critical mass means owning the \_\_\_\_\_ in the client’s mind.

A Gallup pole discovered that the average person knows \_\_\_\_\_ people.

So, if you build a database of 50 Advocates and create critical mass with each of them, you actually get access to \_\_\_\_\_ people!

If the average person moves every 5 years:

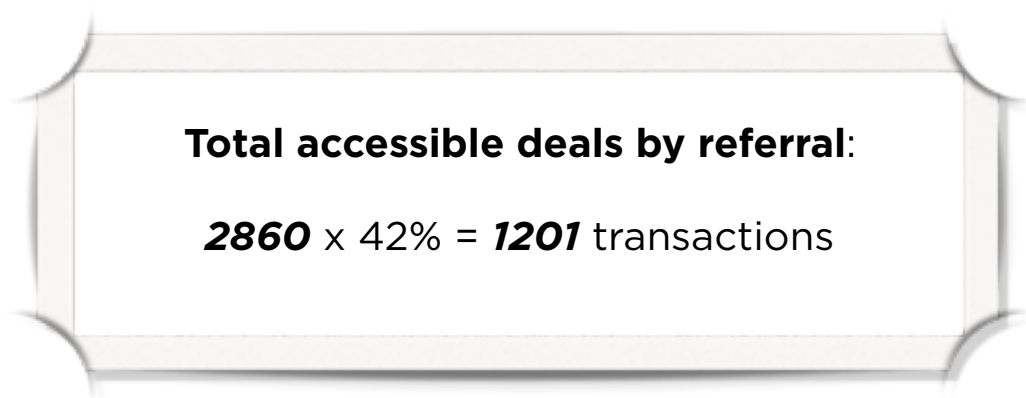
**A.**  $50 \text{ Advocates} \div 5 \text{ years} = \underline{\hspace{2cm}}$  deals by **repeat** business per year.



**B.**  $14250 \div 5 \text{ years} = \underline{\hspace{2cm}}$  potential deals by **referral** per year.

**Total potential transactions** =  $\underline{\hspace{2cm}}$  deals per year.

The NAR 2015 research report said that  $\underline{\hspace{2cm}}\%$  of people selling their home will seek a referral:



## HOW TO MAINTAIN CRITICAL MASS

How many times do you need to 'touch' a person each year for you to 'own the market share' in their mind?

I think

touches per year should do it.

Research conducted by Keller Williams with thousands of top agents indicates that the number of touches necessary per client per year is:

Research shows that

touches per year will do it.

"Your \_\_\_\_ Touch program will be a systematic marketing and prospecting technique, which will ensure year-round contact with your 'Mets'. As with any core task, I recommend that *time be blocked off each week* to make sure these important contacts occur. You must accept this as a basic but crucial job in your business – your ultimate success depends on it...The foundational idea here is that you will make \_\_\_\_ systematic contacts, or brief touches, over the course of the full year... 12 touches a year certainly isn't enough to guarantee you are in the number one or two spot in their mind when they think of real estate. *Research has backed up our experience where frequency is concerned.*"

**- Gary Keller**

*The Millionaire Real Estate Agent*

## WORKING OUT YOUR TAP GOALS

For this system to be practical we must distill everything we've learned down to a set of weekly, monthly or annual goals.

### Touches per year per Advocate according to our TAP goals

<b><u>TOUCH TYPE</u></b>	<b><u>TOUCHES PER YEAR</u></b>
Value Items	
Newsletters	
Phone Calls	
Face-to-Face Meetings	
Personal Notes	
Texts / WhatsApp's / Voice Notes	
Client Parties	
<b>TOTAL ANNUAL TOUCHES:</b>	

## SUMMARY OF YOUR SCHEDULED QUARTERLY CONTACT PER ADVOCATE

**Weeks 1-2:** Send a Value Item.

**Weeks 3-4:** Follow up with a Phone Call (with Harvester).

**Weeks 5-6:** Send a text / WhatsApp / voice note.

**Weeks 7-8:** Send a Value Item.

**Weeks 9-11:** Follow up with Face-to-Face contact.

**Weeks 12-13:** Send a Personal Note.

**Monthly:** Send your newsletter out faithfully.

*Repeat this cycle four times per year with each Advocate, while continually using the correct dialogues.*

If you do that with just 50 people then your activity goals will look like this:

### Correct weekly TAP goals for 50 Advocates

TOUCH TYPE	TAP GOAL
Newsletter	____ PER MONTH
Value Items	____ PER WEEK
Phone Calls	____ PER WEEK
Face-to-Face Meetings	____ PER WEEK
Personal Notes	____ PER WEEK
Texts / WhatsApp's / Voice Notes	____ PER WEEK
Client Parties	____ PER YEAR

## THE IMPORTANCE OF TRACKING

You will not \_\_\_\_\_ everything you need to. That is why activity-based action plans are impossible to implement without tracking your activities \_\_\_\_\_.

You will need to have a way to track two distinct areas of your business:

1. Your \_\_\_\_\_ (e.g. for phone calls made to Advocates today you will need to track, which Advocates you called, the content of the discussions, whether or not you asked for a referral).
2. Your \_\_\_\_\_ (e.g. for phone calls to Advocates you would need to track: whether or not you got a referral, who was it to, have you responded in the four appropriate ways yet (*see pages 27-31*)?)

Having a daily discipline of tracking all your numbers is the first step towards *“running your business like a business”*.

When you know your numbers you can then go to work ON your business because what needs to change (or continue) becomes \_\_\_\_\_.

You need to listen to the numbers  
because the numbers don't lie!

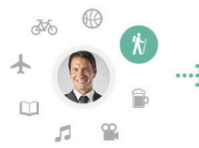


## Deepen relationships and gain business.

Whether prospects, referral sources or key clients, keep them front and center in your life. Our SMART Tools keep you organized and saves time by identifying most likely referral sources, automatically tracking your communications and notifying when and how to reach out.

## Build trust with personalized communications.

Our SMART Message Composer™ prepares pre-written messages and articles based on the specific interests of each of your key contacts which you can review and send with just one click.








Dear Alfred,  
Heard you're off to Hawaii for vacation! Knowing your love for hiking, I saw this article and thought you might enjoy it.



**20 TOP HIKES IN MAUI**

Let's connect when you return.  
Vicky

18 Touches 2 Referrals

-  You sent Alfred an email  
I just wanted to touch base and see how things were going?  
a few seconds ago
-  You sent Alfred an email  
4 days ago
-  You called Alfred  
1 week ago
-  You met Alfred in person  
2 weeks ago
-  You texted Alfred  
3 weeks ago



## See your communication history and never forget a key relationship.

No need to double-up on work. Simply connect your email account and we'll sync your history so everything matches up. Our SMART Touch Notifier™ keeps people from falling through the cracks by considering your history and we'll tell you when it's time to reach out again.


## Automatically ask for referrals, at the right time – in the right way.





With SMART Relationship Builder™ we suggest optimal communication sequences based on relationship level and prior communications that lead to more business and referrals.



Gina Roberts

Gina Roberts  
a day ago since last touch  
18 touches 2 referrals



-  Record Touch
-  Postpone Touch
-  Record Referral
-  Remove from Dash

You can investigate and access this software here:

<http://stevenjohnstone.com/p/technology>

## DAILY DISCIPLINE

I have to \_\_\_\_\_ time to complete my TAP goals.

The best way to achieve your quarterly TAP goals is to do a little bit \_\_\_\_\_.

"If you're running a marathon, remember that every mile is run one step at a time. If you're writing a book, do it one page at a time. If you're trying to master a new language, try it one word at a time. There are 365 days in the average year. Divide any project by 365 and you'll find that no job is all that intimidating. All it takes is discipline - daily discipline, not annual discipline."

**- Charles Swindoll**

Schedule five 2-hour 'TAP sessions' per week to complete key lead generating tasks:

### **TASK LIST FOR YOUR DAILY 2-HOUR TAP SESSIONS**

01. \_\_\_\_\_ - \_\_\_\_\_ your important dialogues.
02. Make your \_\_\_\_\_.
03. Write your \_\_\_\_\_.
04. Arrange upcoming \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ meetings (Drop-By's, Super-Advocate lunches and Referral Team meetings).
05. Send \_\_\_\_\_ Value Items.
06. Once a month send your newsletter to your Advocates and B-list.
07. Send your \_\_\_\_\_ messages / \_\_\_\_\_ notes.
08. \_\_\_\_\_ follow-up (Short term: "Double-Impact" + **BOOK APPOINTMENTS**).
09. Send any referral \_\_\_\_\_ due.
10. Provide any necessary referral \_\_\_\_\_.
11. \_\_\_\_\_ any possible referrals to your Referral Team members.
12. \_\_\_\_\_ all these touches and referrals on **EngagePro** (or your own tracking tool).
13. Communicate with \_\_\_\_\_ clients.
14. Organise your client \_\_\_\_\_.
15. Organise your \_\_\_\_\_ / \_\_\_\_\_.
16. Plan any direct \_\_\_\_\_.
17. Book and plan your \_\_\_\_\_.



Consider your daily TAP session as your having an unbreakable, all-important appointment with \_\_\_\_\_ ('Time Blocking'). Actually book it into your calendar/diary each day as a \_\_\_\_\_ appointment.

"For those who are seeking success at a high level, lead generation time must be considered the most important time on their calendar. And as such it will need to be jealously guarded and protected. Because life seems to love to offer up the unexpected, guarding this time is never as easy to do as it may seem."

**- Gary Keller**  
*The Millionaire Real Estate Agent*

To make this work for you:

1. Get \_\_\_\_\_ and get \_\_\_\_\_.
2. **Maintain** your daily TAP sessions to complete (or schedule) your touches, and be "*ruthless in \_\_\_\_\_ this lead generation time*" (Keller's words).
  - a. Switch your mobile phone OFF! Return calls directly after the session.
  - b. Communicate this to the people around you and make sure that no-one interrupts you.
  - c. NEVER schedule appointments in this time.
  - d. Set a 'TAP session hit rate' goal. Get a coach to help you track your performance and hold you accountable.
3. Ensure your Value Items go out \_\_\_\_\_ six weeks.
4. Ensure your newsletter goes out every month.
5. Each week make up for lost Face-to-Face touches with \_\_\_\_\_.
6. Keep up your discipline with your \_\_\_\_\_.
7. Commit to an annual \_\_\_\_\_.
8. Role-play, memorise, internalise and consistently use your \_\_\_\_\_.

### MY TAP SESSION GOAL

The best time for me to have my TAP session will be on \_\_\_\_\_ (days), between \_\_\_\_\_ and \_\_\_\_\_ am/pm (times).

Failure to stay disciplined with your TAP sessions will have these consequences:

- Procrastination will become your biggest enemy and you will find that by the end of each week you feel so far behind that you will give up on trying.
- You will not achieve your TAP goals.
- You will not form new habits.
- You will not get the referrals you desire, nor will you achieve your financial goals.
- You will always feel out of control.
- Your referral system will just become a burden to you.
- You will eventually give up on the system and go back to your old way of working.

"After 12 months on this program I now predictably receive 25 - 35 referrals per month. From 3 - 5 January, normally a slow time, I picked up five exclusive listings from people on my database. Many of them wanted to start the transaction while I was away in December but were willing to wait until I got back!"

**- Leigh de Wet**  
*Good Living Properties*

"After being close to burnout I joined Steve's coaching program. In the first three months my turnover rocketed to R35 million, but surprisingly I'm more in control than ever. I now receive between 20 - 25 referrals per month and in the first month of this year I turned over R111 million! The accountability and focus that my coach has brought has been key for me, benefiting not only my business, but also my family and all I hold dear."

**- Mike Kershaw**  
*Two Avenues Properties*

"As a direct result of one of these referral strategies I generated 43 referrals leading to 5 sales and 10 listings and ended up getting my business in the local press! With Steven's system you spend 100% of your time and well-earned money working only by referral, and you are not the typical estate agent any more."

**- Trish Sutton**  
*RE/MAX Midlands*

"Thanks to this system I have 8 listings at the moment and have had to double the size of my adverts! I have never had so much stock in my real estate career."

**- Daleen van der Linde**  
*Linprop Realty*

"One week after sending out my first value items I received 6 referrals and within the next two weeks I sold 3 houses."

**- Benita Basson**  
*Acutts*

"I just started my own agency at the time of attending Steven Johnstone's course. It left me feeling a little more motivated but I was still expecting a catch. I decided to sign up for the coaching program and my confidence and success grew in leaps and bounds. The results have been phenomenal. This month alone I have 11 properties on my books, 9 of which have been referrals straight off my database!"

**- Desiree Moodley**  
*(Zone 9 Properties)*

"Steve's system has changed my life. I don't do show-houses any more. I work exclusively by referral. I can even take time off my business and people wait for me to get back. The last time I went on holiday I returned to 7 referrals waiting for me to get going with. It's an awesome, awesome program!"

**- Zarita Pinter**  
*Realtor® of Excellence*

"With my first 31 calls using the Database Primer Dialogue I got six quality referrals which gave me two new developments to sell, three residential listings and one residential sale! I am thrilled and I can see that the program is really working!"

**- Zanna**  
*Kayaramina Properties*

## C. IMPLEMENTATION

Three things will vastly improve your chances of successful implementation:

1. Some clever relationship marketing **technology**.
2. A weekly **roadmap** for launching your referral system. This should cover the first 3 months.
3. A personal coach, or small group, to guide you through (and hold you accountable during) your launch quarter.

### TECHNOLOGY

Good relationship marketing software will:

- 01 Track the types and frequency of touches with each Advocate, together with details of past discussions.
- 02 Produce a simple and manageable communication plan for each week, including a report of which Advocates need to be touched that week.
- 03 Assist with the content of your communication, customising each piece of communication for each “Advocate” based on their personal interests.
- 04 Track your referral sources over time showing you who your Super-Advocates are.
- 05 Enable you to create a “Referral Team” of allied service providers.
- 06 Easy to use, with an intuitive design.

### THE POWER OF A WEEKLY ROADMAP FOR YOUR LAUNCH QUARTER

ANSWER THE FOLLOWING QUESTIONS HONESTLY

- Have you ever bought exercise equipment and not used it?
- Or joined a gym and not gone?
- Have you ever had a great idea and not done anything with it?
- Have you ever gone to a terrific seminar and come home all fired up for action, only to lose that energy and commitment through inaction?

It is hard to implement a complex system in an **orderly** way.

This is the reasoning behind the 13-week **Intensive Launch Program**.

# THE INTENSIVE LAUNCH PROGRAM

This is an incredibly powerful and exciting program!

It's purpose is to break down the initial implementation of your **Trusted Advisor Program** into 13 simple steps.

One week at a time I will lead you step-by-step from having no referral system to start with, all the way through to having a fully functioning **Trusted Advisor Program** by the end.

Each week's assignment will be clear and simple, uncluttered from the complexity of the broader system.

Week-by-week, as you simply 'join the dots' as I lead you through, you will see your own referral system beginning to take shape!

Every Monday morning you will receive an e-mail from me with a short video in which I explain what your next step is for that week. The e-mail will also include any resources you might need for that week's project.

It's like having a personal coach guide you through a forest of complexity until you come to the glorious daylight on the other side 13 weeks later!

At the end of the program your **Trusted Advisor Program** will be fully up-and-running. From there you will simply continue to maintain your 12-week cycle of touches as described in this seminar.

**You will have a referral system running in your business!**

The cost of the program is \$1115. To enrol, please e-mail me directly at [steven@stevenjohnstone.com](mailto:steven@stevenjohnstone.com).

I look forward to working with you!

Steve