

PRESCRIPTION FOR ENGAGEMENT

Let's be clear about why you're doing this. You are called to invest in your database, if you want to run a strong referral-based business, because you cannot compete with the billions of dollars invested in advertising, attempting to capture the heart and mind of consumers. Zillow, Redfin, Open Door and all of the other local and national companies that do not have a relationship with the people in your database are telling the people in your database that they are the experts and they are attempting to demonstrate that cheaper is better.

You are going to engage in the behavior as prescribed below because you are dedicated to excellence and dedicated to a referral-based business that will serve your consumers at a much higher level than any of the large advertising companies can possibly do. And, this is the only way you can compete. Your advertising is never going to be as sexy. Your content is never going to be as thorough.

And you are the only one who has the ability to have a real relationship that delivers personal value on a regular basis.

	Calls	F/U Personal Touch	Parties/Social	Value & Expertise Touch	Non-Real Estate Related Touch	Marketing	Real Estate Review
A+'s	Every 30 days	Often and special	Every 90 days in groups and one on ones at least every 90 days	6 times annually (every other month)	Monthly	1 to 2 times per month electronic and mail	2 times per year Once in the winter, once late-summer, with the offer of as often as they need/want
A's	Every 30 days	Every 90 days at least	Every 90 days	6 times annually (every other month)	Quarterly	1 to 2 times per month electronic and mail	2 times per year Once in the winter, once late-summer.
B's	Every 60 days	As determined valuable	Every 90 days	6 times annually (every other month)	Quarterly	1 to 2 times per month electronic and mail	1 time per year Once in the winter
C's	Every 180 days	As determined valuable	Only if they are becoming a B or A	Quarterly Written or delivered by you to the group.	Quarterly	Once per month Email marketing only. Do not spend money on this group.	Only when specifically asked, and when asked you move them to a "B".

ACTIVITIES OF ENGAGEMENT

CALLS - These are relational calls. You're calling to say hi to your friends, family members and past clients. You're calling to have a relationship and invest in that relationship. You are calling because you care. You are not asking for referrals, you are not talking business.

You are talking about them, their family, their work, their vacations. Use the F.O.R.D. Methodology of family, occupation, recreation, dreams. Just be interested. We believe this is the most important activity you can engage in and is even more powerful than face-to-face interaction, because it is so efficient. A phone call is still a highly personal interaction.

FOLLOW-UP PERSONAL TOUCH - As a result of a voice to voice conversation with another person, you may determine there is some activity in which you can engage that is meaningful.

For example, you have a client or friend whose child is going off to college. After getting off the phone you do five minutes of research to find a great article that helps parents with kids going off to college. Maybe you write them a personal, encouraging note.

PARTIES/SOCIAL - While calls are incredibly efficient and still relational, nothing replaces face-to-face interaction. In particular, if you are the facilitator of an event, you are creating an experience through which the people invited deepen a relationship with you. Do not make these events about business. These events are about relationships.

They can be casual, they can be formal. You can invite 10 people or 100 people. You can make them a potluck or catered. You can invite your A+ to golf or on a hike, or your entire database to a party. Be creative, just engage. Business development is a byproduct, not the purpose.

VALUE & EXPERTISE TOUCH - Far too many agents hope consumers will do business with them because they have a relationship, or because they market to them. The shift that is occurring in the industry demands that you differentiate yourself as an expert. What is important about the delivery of this information is your editorial. The consumer must see and hear your words and your voice.

This can be statistical information about real estate trends or economic information based on administrative policy. This could be development information in the Denver marketplace, with you drawing conclusions about what is meaningful about the information. You must commit to not just having a relationship but demonstrating that you are an expert.

NON-REAL ESTATE RELATED TOUCH - This is so incredibly powerful that it cannot be overstated. This is a quarterly email (or more often as you may choose, just don't overdo it) to your entire database, A's, B's, and C's. In this email you are simply sharing something that was an experience for you.

A great restaurant, an incredible service, an example of somebody delivering world-class, a great book and what was meaningful about that book to you, a Ted talk or YouTube video that was impactful to you. You have an opportunity to impact people beyond just being the person that facilitates their transaction.

MARKETING - Yes, you can overdo it. Yes, relationships you genuinely care about may at some point say, stop sending this crap to me. However, if you do a great job of investing in relationships, the value of the deliverable to your database that is intended to only remind them you are in real estate, is tremendous.

You can send marketing pieces like Bronco schedules, coupon postcards, notepads. They are okay. We recommend you also send things that remind people you are in real estate like listing videos, saved property searches, interest rate information, quarterly referrals to your top vendors that are meaningful for that season.

ANNUAL/SEMI-ANNUAL REAL ESTATE REVIEW - We believe the real estate professional of the future is the individual that has the capacity to evolve their practice as a consumer advocate and consultant and become the wealth management advisor for the consumer's real estate assets. This means doing at least an annual review of their real estate holdings and as any good wealth management advisor would, asking questions about their plans or needs for the coming year.

To do this properly, you need two things; first, complete a quick market analysis of their property to give them an estimated range of value and demonstration of trends for their home and neighborhood. Second, commit yourself to being a consultant and ask questions about their needs as an individual or a family that may be coming up over the next year. Provide context, this means you are sharing with them that you don't care if they sell their home or buy another property, you are there as a resource to help them live in that property as well as possible. That may mean referrals to key contacts of yours like insurance providers, lenders, landscape companies, architect, handyman, painter, electrician, plumber, carpet. Ask them questions like, any major projects you would like to do on your home? Maybe some handyman repair, maybe some updating, maybe something as major as an addition or total remodel? You holding this annual consultation is about your investment in helping them live in their home, not just convincing them that you are the person to help them buy or sell real estate.