

# REALTOR Database Contact Plans & Scripts

## Business Generation Methods

Use these REALTOR database contact plans and scripts that top real estate agents use to systematically stay in contact with friends, family and clients in their referral networks over the course of a year. Learn how to create, systematize, contact and grow a REALTOR database into a profitable book of business that generates a predictable amount of annual business. Before utilizing the plans and scripts provided below, watch as three top producing agents reveal their REALTOR database contact plans and how they use them to increase their production over time.

## REALTOR Database Plans: How to Create, Contact & Grow

## REALTOR Database Plans: Predictable Results

Successful REALTOR database plans contain a sufficient amount of pre-determined “touches” to people in the database over the course of a year through different mediums of communication. These varied touches may be made through emails, mailers, telephone calls, drop-bys, greeting cards, client appreciation events, and etc. In *The Millionaire Real Estate Agent* by Gary Keller, Jay Papasan & Dave Jenks, it is recommended that agents use a “33 Touch” plan to make 33 different touches to the members of their database to obtain a ratio of 12:2 on the business that they receive in return. So for every 12 people in the database, the agent will receive 2 transactions back from the database after completing 33 touches in a year. For example, if an agent has 500 people they know in a database and makes 33 annual touches on all of them, the agent should anticipate receiving 83 closed transactions ( $500 \div 12 \times 2$ ) in return!

Although these results may seem unbelievable, understand that completing a 33 touch on 500 people is not easy. If an agent includes just 3 telephone calls as part of a contact plan they must make 1,500 telephone calls over the course of a single year. The concept may be simple, but it certainly isn't easy. Although using a good customer relationship manager (CRM) certainly eases the process, the organization, planning, time management, accountability and courage it takes to carry out an effective REALTOR Database plan requires a bit more effort than the majority of real estate agents are willing to put forth.

## Sample REALTOR Database Scripts

The following three REALTOR database contact scripts are examples of some ways agents can reach out to the people in their database by telephone to stay first of mind and obtain client referrals.

### 1. UPDATING YOUR DATABASE

*“Hi \_\_\_\_\_, this is John Smith with ABC Realty, how are you today? I’m calling because we are reviewing our database and noticed that we are missing some information like email addresses, phone numbers and etc. So that we can stay in touch with you, we need to get our records updated, is that okay?”*

*“Great! So let’s see, it looks like we need your email address . . .”* (Obtain address and ask for any other information needed).

*“Perfect, thank you! So is there anything that we can do for you right now?”* (Respond if applicable)

*“Remember that we are here for you to take care of all your real estate needs and thanks again for your help!”*

## **2. TO CONTACT COI DATABASE TO GROW PREFERRED VENDOR LIST**

*“Hi \_\_\_\_\_, this is John Smith with ABC Realty, and I am reaching out to you for a recommendation. I am attempting to enhance the customer service that I provide by expanding the list of trusted professionals and business vendors that I recommend to my clients. So whether it be a financial planner, auto-mechanic, or anyone that has done work around your home, who do you know that did a great job for you that I could recommend more business to?”*

*“Thank you! Would you mind if I mentioned that you referred me when I reach out to them?”*

*“Great! One last question, if you were to run into anyone looking to buy or sell real estate would you be willing to refer them to me?”*

*“That’s great! Thank you. Oh by the way, you don’t happen to know anyone thinking about buying or selling their home in the next year do you?”*

## **3. PAST CLIENT FOLLOW UP SCRIPT**

*“Hi \_\_\_\_\_, it’s John Smith with ABC Realty. I’m just calling as a customer service to check in with you to see how you’re doing in your new home. How has your new home been treating you?”* (Remember that the key is to continue to ask questions to uncover a preferred vendor need that you can help to refer.)

*“What have you done to it?”*

*“Are you planning on doing any work or improvements to it in the future?”*

*“Would it help if I gave you the contact information of some professionals that I trust that could help you get that done at a reasonable cost?”*

*“You see, I want you to think of me as your total home resource. Like your own personal Angie’s List. So you can save yourself some time & frustration by letting me refer you to a tested & trusted company for any homeownership needs that may come up. Would that benefit you?”*

*“Great? Oh and by the way, I want to work with more clients like you, and I find that people typically hang around similar people. I would love to have more clients like you, so do you know anyone else looking to move in the near future?”*

# **Sample REALTOR Database Contact Plans**

Use the following sample REALTOR database contact plans as examples to help craft a manageable plan to stay in communication with the people you know over the course of a year. Remember that implementation is more important than creativity, so be sure to create a plan that is simple enough to be completed in it’s entirety.

## **Sample Database Contact Plan #1**

12 Newsletters – Mail Out the 15<sup>th</sup> of Each Month

## 12 Emails – 1<sup>st</sup> of Each Month

- January – Happy New Year/Goals
- February – Happy Valentine's Day
- March – Happy St. Patrick's Day
- April – Market Update
- May – Happy Mother's Day
- June – Happy Father's Day
- July – American Dream: Home Ownership / Happy 4<sup>th</sup> of July
- August – Back to School
- September – Market Update
- October – Happy Halloween
- November – Happy Thanksgiving & Thanks for Your Business
- December – Happy Holidays & Recipe

1 Client Appreciation Event – Open House & Photos with Santa (email, mail & call COI)

1 Christmas Card – Handwritten & Sent Early to Mid December

2 Postcards – Mail Out

- Spring Forward Time Change Reminder – March
- Fall Back Time Change Reminder – November

3 Phone Calls to COI

- Call through database in Alphabetical Order every 4 months

1 Facebook Direct Message – “Thinking of You” and/or “How have you been?”

1 Annual Magnet Calendar – Mail Out

## Sample Database Contact Plan #2

18 Emails – Automated in CRM to send every 3 weeks

12 Mailers – Sent Monthly:

- January – Happy New Year “Thank You for Making it a Great Year” postcard w/ photo of team
- February – Flyers/Coupons for local area Home, Garden & Patio Show
- March – Local Pro Sports Schedule
- April – Local & National Market Update
- May – Flower & Garden Seed Packets
- June – Summer Community Events Update: Graduations, Water Park Coupons, Summer Camps, etc.
- July – Local & National Market Update
- August – Back to School Shopping Coupons & Sales
- September – Flyers/Coupons for local area Home, Garden & Patio Show

- October – Local & National Market Update
- November – Canned Food Drive (leave bags on doorstep to pickup) & include Holiday Recipe
- December – Happy Holidays Cards

2 Phone Calls – to everyone in COI

- 10 contacts per week (250 in COI; 52 weeks ÷ 2 calls = 26; 250 ÷ 26 = 10 contacts per week)
- Use Scripts to Come from Contribution & Ask for Referrals at same time

1 Drop-By – Pumpkins Delivered to Doorsteps (October/November)

1 Client Appreciation Event – Tailgate & Suite/Skybox at Professional Sports Event (email, mail & call COI)