BTG
Real Estate

8 POWERFUL STEPS
TO A PROFITABLE DATABASE

BRANDON TRACY
OWNER/CEO/REALTOR®
602-826-0213
brandon.tracy@btgrealestate.com
www.btgrealestate.com
@iBrandonTracy
/brandon.tracy1
Brandon Tracy
#BTGRealEstate

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EAST VALLEY
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BTG Real Estate

8 powerful steps to build your foundation and protect the future of your business.

Personal Sphere of Influence and MET Database On-boarding Cheat Sheet

OBJECTIVES:

1. Collect/Update all critical contact information including: Full Name, Phone, Email, Address
2. Demonstrate professional follow up and follow through to influence the trust and confidence you receive from your database.
3. Organize communication efforts. Market Reports, Sales Activity Reports, 8x8, 33 touch, Newsletters, etc.
4. Encourage your database to refer friends and family to you AND show them how.
5. Collect secondary contact information including: Birthday, Anniversary, Kids Names etc.
6. Don't just ask for referrals. Earn the right to receive them!

ACTIONS:

DAY 1
1. Introductory Phone Call: This call is an introductory call to make your contact aware of your new position/career and your excitement in having the opportunity to be a professional resource for them going forward. This SCRIPTED call is designed to collect/confirm critical contact information and begin the professional relationship building process.

DAY 2
2. Introductory Email: This email is a follow up to your call to establish follow through and set an example of professionalism. It includes information about your business and encourages your contact to engage with you whenever they have questions, concerns, or general curiosities about real estate. This is typically a canned/scripted email prepared ahead of time. It may also encourage them to like your business Facebook Page.

DAY 3
3. Handwritten Note: This handwritten thank you note is strategically written in blue ink and is an easy way to obtain their address for something as non-threatening as a thank you card. Business cards are always included in your handwritten notes for clients to have and to hand out to friends, family, and co-workers. This card is scripted.

DAY 8
4. Card Follow up call: This is a call to check and make sure they received your handwritten note. It demonstrates professional follow through and follow up. These activities build professional trust in individuals looking to do business with someone they know. This is also your opportunity to continue offering value. You'll confirm whether or not they own a home or rent and prepare homeowners to receive a Neighborhood Sales Activity Report or similar market report for their specific home.

DAY 9
5. Neighborhood Sales Activity Report/Market Report: You will construct a NSAR (Neighborhood Sales Activity Report) and send them an introductory email that explains the report. It should be automatically delivered to them once a month. Call it a 'nosy neighbor' report if you will, it helps them keep an eye on what is happening in their direct neighborhood.

DAY 10
6. Text to Confirm NSAR Received: A quick text to confirm shows your follow through and it's a quick and easy communication. Encourage them to reach out to you with any questions about the monthly report or if they have any other questions.

DAY 15
7. The "How to refer me" Email: This email is a very basic instructional email to start encouraging and teaching your contact how to refer you business. Letting your database know how they can most effectively refer their friends and family to you takes the guess work out for them. The more they see your follow through, and the easier you make it on them, the faster those referrals will come.

DAY 20
8. The Referral Call: This is a scripted call to thank them for their support so far and to specifically ask them if they know anyone looking to buy, sell, or invest in real estate.

You can now assign your contact to the traditional 8x8 and 33 touch programs. You have the ability to communicate with them now on multiple marketing platforms including email, hard mail, social media, phone call, text, etc. Do not be afraid to EARN the trust and confidence of the people in your life. They may know and like you as a person, but they need to trust you as a professional.

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EARNING THE PROFESSIONAL TRUST AND CONFIDENCE OF THE PEOPLE YOU KNOW

Your Personal Sphere of Influence includes everyone you know personally or have met personally. These people include your friends, family, old co-workers, past clients, or any individual you've met and have contact information for. This group of people makes up the foundation of everything you'll accomplish going forward. It's important that you cultivate these relationships into referral business. **In Real Estate, if you keep the people you know, you'll be successful for many years to come.**

- A good Real Estate Professional is in a constant state of meeting new people and gathering their contact information to utilize as a way to build a trusted professional relationship.
- Your Personal Sphere of Influence or MET Database is your only asset in your personal business. It should be communicated with strategically and continually. This is the most common place for Real Estate Agents to create business as well as secure their long term future of success.
- BTG Real Estate has a complete process for introducing these people to your business and teaching you how to extract deals and referrals from the people you already know. These are the people most invested in your success. If you can't work towards winning these people over, you'll likely not succeed long term in real estate. Remember, keep the people you know!

First things first

You're going to create a spreadsheet with all the people on your list. This list should absolutely not be shorter than 100 people. The more people you have on this list that you can communicate with, the better. Think long and hard about who you know. Challenge yourself to put people on this list that you otherwise might not. Don't tell yourself little lies and stories about why anyone should be left off the list. **There are no secret agents at BTG Real Estate.**

*Note - At first, it's ok to have just one form of contact information. Part of your SOI Scrub will be to fill in the rest of the information through our detailed cultivation process. Scripts and action plans are provided in our Sphere Plan of Action.

FAQ

1. What if I have a bunch of people out of state?
   a. That's ok. Although you're primarily going to work in your state of residence, you'll want your out of state friends and family to see you as a resource to connect them to an agent in their area. This will generate referral fees on your behalf. You want everyone you know to see you as a Professional Real Estate Resource!
2. Where will all this information go?
   - BTG Real Estate admin team will input your data into your contact management database system known as Brivity. These people are sourced under your name and are owned by you, not the business. You will utilize this system to help you in cultivating these relationships.
3. Will I be bombarding these people with marketing?
   - NO. **You will** be cultivating these relationships through personal contact and professional follow up systems including but not limited to: Personal Calls, Handwritten Notes, Personal Emails, Company Newsletters, Company Holiday Cards, and other basic communication.

**Your success foundation starts here. If you choose not to take this seriously, then you've chosen to limit your earning potential both short term and long term.

GETTING STARTED

Building your foundation for success and protecting your biggest asset - Your sphere of influence/ database

Let's get a few things out of the way:

1. **You're going to have call reluctance.** You're going to tell yourself to skip people, delete people, etc. Do not make up stories about your sphere. Everyone has these feelings, successful agents learn to push through these negative thoughts. DO NOT under any circumstance talk yourself out of success.
2. **What if someone is not happy to hear from me?** 99% of people are going to respond to you in such a positive way that you'll be surprised how rewarding it is to go through this exercise.
    - What about the other 1%? - Don't operate out of fear or out of entitlement. Some people are not just going to jump at the opportunity to buy or sell real estate with you. It's your intention to EARN their trust and confidence. Just because you don't receive it right away doesn't mean that you stop trying.
    - This is a cultivation process. Results can be seen right away but you should expect to build trust and confidence through demonstrating professional follow up and follow through.
3. **Follow Through.** This doesn't work unless you follow through. Don't skip anything. Skipping parts of this process shows your lack of ability to follow through on your own success. It also indirectly shows the client your lack of follow through. This should not be the first example you set for yourself or the people in your life.

"We lead generate to find a deal - We lead follow up to build a business" - Gary Keller

Additional FAQ's

1. What if I can't get them on the phone?
    a. Additional scripts and contacts are available including Voice Mail 1, Voicemail 2, as well as Facebook Private Message Script to help cultivate this relationship to the contact level. Do not give up too early. Remember, you're not entitled to anything throughout this process. You must be detailed and thorough. After all, this is the foundation of your success going forward. How strong do you want it to be?
2. Do I really have to write all these people a handwritten note?
    - Yes. Encourage yourself to adopt an excuse free mindset and commit to a higher level of service in order to create the income and lifestyle that you want.

ACTION ITEMS

Action Item 1 - The Introductory Call

What am I looking to accomplish?

1. You're telling them about your new position/career, your passion, and how excited you are to be able to provide professional value to them.
2. Collect and fill out their contact information
   - Full name, phone number, email, and mailing address.
     Feeling brave - get their birthdays, anniversary, etc. More info the better.
3. Ask their permission to be a professional resource for them whenever they need information.
4. Do they know anyone that you can help? (A way to get referrals)
5. Can you send them some business cards? (A way to get address)

Call script provided on the next page.

If they don't pick up the phone when you call:

Voicemail #1

Hi ___________, This is _______________. I just wanted to give you a call, it's been awhile since we connected. Give me a call when you get a moment, I'm wondering if you might be able to help me with something.

- Remember to always leave your phone number twice
- Speak slowly and clearly when leaving your number

Voicemail #2

Hi ___________, It's _______________ here again. Hey I just wanted to follow up from my voice mail out to you. I'd love to catch up whenever it's convenient for you. Give me a call when you get a minute to spare.

- Remember to always leave your phone number twice
- Speak slowly and clearly and when leaving your number

If you are not getting a return call, it's not the end of the world. Keep trying. The follow through you demonstrate here is setting the tone for your professional follow through going forward. If you cannot fill out the contact information, try getting it manually by doing the following:

- Facebook Messages - Many people respond really well to Facebook messages
- Text Message - An easier and impersonal form of communication that many people will respond to.

Important - Facebook and Text should not replace any initial phone attempts. They are to be used as a 3rd and 4th option.

INTRODUCTORY PHONE CALL SCRIPT:

Hi (Contact Name), It's _____________, How are you doing today?

- This is a business call today do you have 2 minutes for me?
  - Be gracious and thank them for their time
- As you may or may not know, I'm working as a Real Estate Professional and I wanted to reach out to you to ask for your support in taking the customer service aspect of my business to the next level. Could I ask you to help me with something easy?
  - Wait for response, be gracious.
  - It's simple, I'd like to work towards earning your trust and confidence as a prefered Real Estate Professional.
  - Would you feel comfortable coming to me for information when you needed it?
    - Contact Responds
  - My main goal is to be a professional resource for the people in my life and to make sure everyone knows they can come to me for information without any obligations. I've recently partnered with BTG Real Estate at KW because of their advanced commitment to customer service and professionalism. I'm excited to share this experience with my friends, family, and past clients.
  - Is there anyone in your life that could use a resource like myself to gather information on buying or selling a home?
    - Response is usually "not at the moment" or similar
  - No worries, If it's ok with you, I'd like to send you a quick 'thank you' note with some of my business cards. Would that be ok?
    - Response
      - Takedown full mailing address.
  - I'll send you a quick email as well with my contact information and company info. I want you to know that I really appreciate you giving me the opportunity to talk about my business. I promise to take great care of anyone you might refer to me.
    - Now that I've asked the world of you, is there anything I can do to support you?
  - Be responsive and prepared to take notes - follow through on anything you agree to.
    - Thank them again and exit the phone call.

Notes:
Remember to be personable. It's ok to veer off script to talk about personal items that you have in common with your contact. Just remember to hit all the bullet points before exiting your call. DO NOT SKIP, remember this is the foundation of your business, skipping steps is like creating cracks in your business foundation.

Once you've had this conversation you will apply the plan: BTG PSOI Onboarding Official

ACTION ITEMS

Action Item 2 - First contact follow up email

After you've assigned the BTG PSOI Onboarding Official plan in Brivity, the following email is sent automatically to your contact on your behalf.

Hi (Contact),

I wanted to thank you for taking my call and express my gratitude for giving me the opportunity to be a professional resource for you in the future.

I'm excited about the opportunity to partner with BTG Real Estate and bring a superior level of customer service, marketing, and support to my clients. Our goal at BTG Real Estate is to positively influence the way our communities view real estate professionals and bring detailed, transparent, and trustworthy service to our clients.

There are a couple of things you can do to help me today!

1. Please consider liking our Facebook page HERE. You can see our reviews and it's a great way to keep an eye on my team's progress.
2. Introduce me to people in your life that I can help, even if they just need information. My goal is to earn the trust and confidence of all my potential clients by providing them a safe place to get information and ask questions without feeling pressured. It's never too early to speak with me and I've got the backing of one of the top teams in the valley to help me provide the best in professional value.

I'll be following up with you again soon as I look forward to being a professional resource. Thank you again for the opportunity to earn your trust and confidence.

Sincerely,
(Agent Name)

Action Item 3 - Handwritten Note: 1 day after Action Item 2 is complete

The Brivity Contact Management System will notify you when it's time to send your note card. You will write and send the card on the same day. Then check the task complete. *Notes should be written in blue ink and include 2 business cards.

Note card script:

(Contact Name),
I wanted to thank you for giving me the opportunity to continue to earn your trust and confidence. My goal is to meet and exceed the expectations of everyone that gives me the opportunity to be a professional resource for them, their family, friends, or coworkers. Please don't hesitate to reach out to me with questions, concerns, or general curiosities. I appreciate you and I'm always happy to help. Please consider passing one of my cards on to someone that I can help!

Sincerely, (Agent Name)

Plan Action Item - If they own a home - Tag: <u>Homeowner</u> and <u>BTG Client Mailing List</u>

ACTION ITEMS

Action Item 4 - Note Card Follow up Call: 6 Days after Action Item 3 is complete

Objective:
- Confirm receipt of note card
- Ask them if they own any other property they would like you to include in the NSAR.
- Tell them about the NSAR if they are a homeowner in Arizona.

Phone Script
Hi ___________, It's _____________. How are you today?
- I won't keep you long, I just wanted to make sure you received my note and cards in the mail?
  - Contact response
- Great, I appreciate you being an advocate for me.
- There is one thing I'd like to provide for you before I let you go, We call it a Neighborhood Sales Activity report. It's designed to keep homeowners informed about what their neighbors homes are selling for. I'd like to provide that for you. Can I tell you what that looks like?
  - **Client Responds**
  - Once a month you'll receive an email update from me and it will include:
    - What homes have been listed and for how much
    - What those homes sold for and if any seller concessions were provided
    - All the pictures from each home so you can see upgrades and features
  - Would you allow me to do that for you?
  - **Contact Responds**
- Thank you, I'll be sure and put that together for you and have it over to you in the next 24 hours.
- Please let me know if there is anything you ever need.
- Exit call graciously

Action Item 5 - Neighborhood Sales Activity Report:
Refer to the Neighborhood Sales Activity Report step by step process at the end of the booklet.

ACTION ITEMS

Action Item 6 - Text to confirm NSAR was Received: 1 day after Action Item 5 is complete

Copy and paste this text for ease of use.
Hi (Client), Just wanted to send you a quick text and confirm that you received my email giving you access to your Neighborhood Sales Activity Report. If you didn't receive it, please check your spam and let me know. I'll be happy to re-send it to you. It's one of the best ways to watch your home's value. Thank you again for allowing me to earn your trust and confidence.

Action Item 7 - "How to refer me" Email (Automated): 5 days after Action Item 6 is completed

Hi (Client)
I don't want to miss any opportunities to help be a professional resource for the people in your life and I'd love an opportunity to earn their trust and confidence. I've noticed that often times people are hesitant to give me a referral because they fear I will call and "sell" the person. It's important to me that I let everyone know what my goals are when they give me a referral:

- When I reach out to them the first time, I'm simply introducing myself as someone that they can utilize for information
- I'm always aiming to be a professional resource first and foremost
- I'm interested in helping people gather information and do their due diligence
- I understand I will need to earn their trust and that it is not a given that they will choose to work with me

When you have a friend, family member, or coworker that has expressed a desire to buy or sell real estate, please feel confident that you can send me their contact information knowing that my intentions are professional and honest.

Thank you,

Action Item 8 - The Referral Call: 10 days after Action Item 7 is completed

Hi ___________, Its (Agent Name) - Hey I just wanted to thank you one more time for allowing me to introduce you to my business. I'm very thankful for the opportunity.

Client Response:

I was just wondering if you've talked with anyone recently who might be interested in buying or selling a home?

(If they can't think of a name to share immediately)

That's ok. but if you do hear of someone in the future, will you keep me in mind? I'd really like to get the chance to work with anyone you know who's looking to buy or sell. Please just give me a call or drop me an email if you hear of anything. (wait for response)

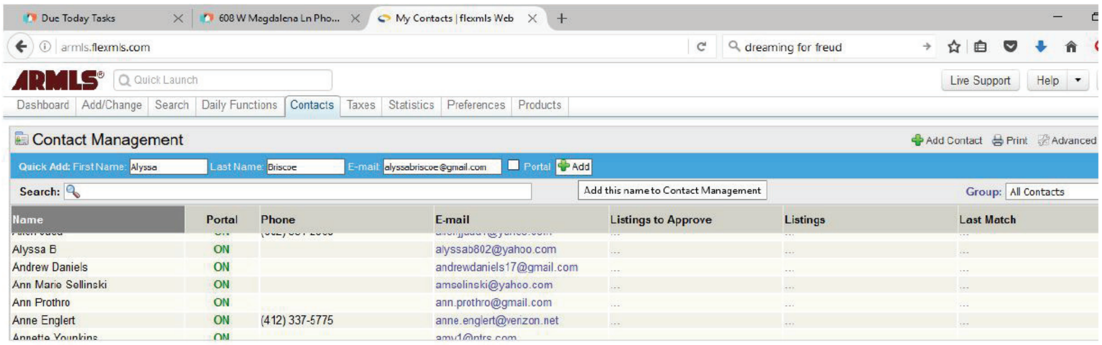
Thank you very much. Now that you know I'm here, I'll plan on staying in touch with you every 3-4 months via phone or text just to check in, would that be ok?
Client Response: Yes/Of Course

Thank them and Exit call gracefully and professionally.

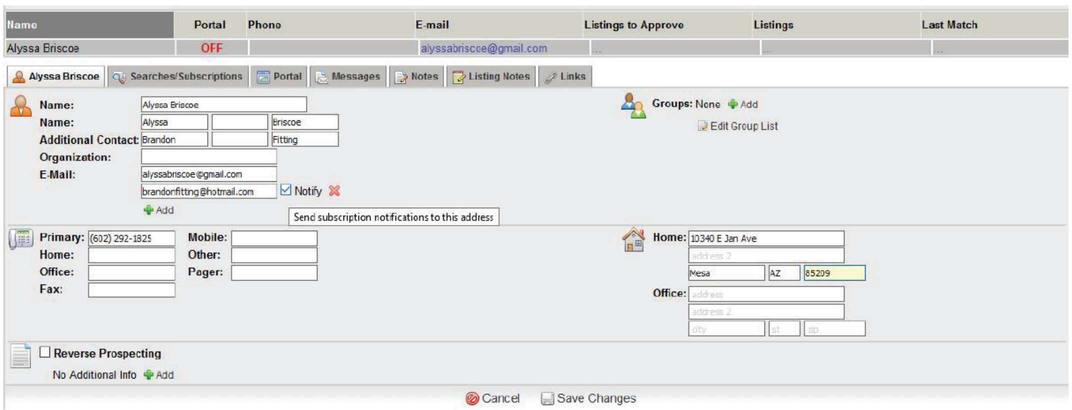
Voice Mail Script:
Hi (Client), It's (Agent Name) here again with BTG Real Estate. I just wanted to thank you again for allowing me to introduce you to my business. I'm very thankful for the opportunity. I'd really like to get the chance to work with anyone you know who's looking to buy or sell a home. Please just give me a call or drop me an email if you hear of anything. I'll plan on staying in touch with you via phone or text every 3-4 months as well. I greatly appreciate the opportunity to earn your trust and confidence. Have a great day and I'll look forward to staying in touch.

Action Item 5 - Neighborhood Sales Activity Report/Market Report:
1 day after Action Item 4 is complete

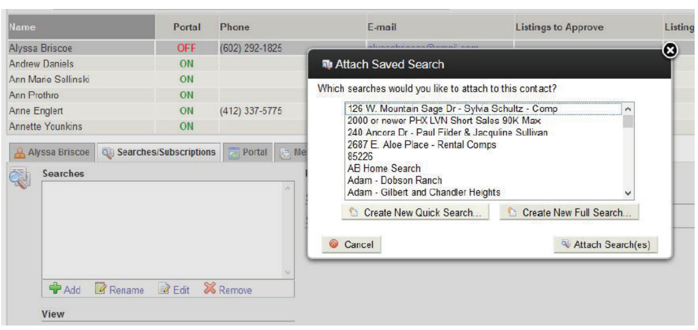
Log into MLS, under the “Contacts” tab open “Contact Management.” In the “Quick Add” section, enter the client’s First Name, Last Name and Email Address and select “Add”

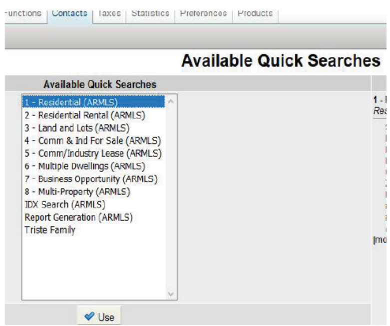


In the contact, select “Edit Contact” and fill in with all relevant and accurate information (phone number, address etc). If there is a spouse/ significant other enter their information in “Additional Contact” and add their email address, if available. When adding a secondary email address, click the “Notify” box. Once all information is complete “Save Changes.”



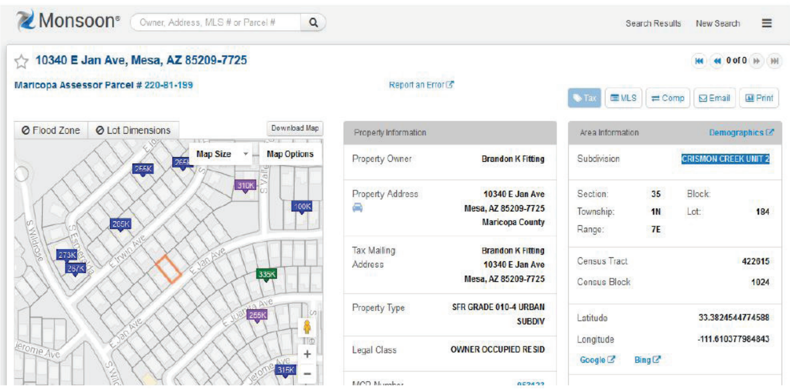
Go the the “Searches/ Subscriptions” tab, under “Searches” select “Add – Create New Search,” this will take you to Quick Search – Residential Search.

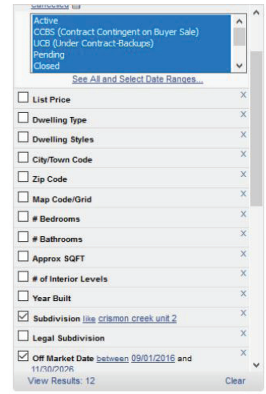




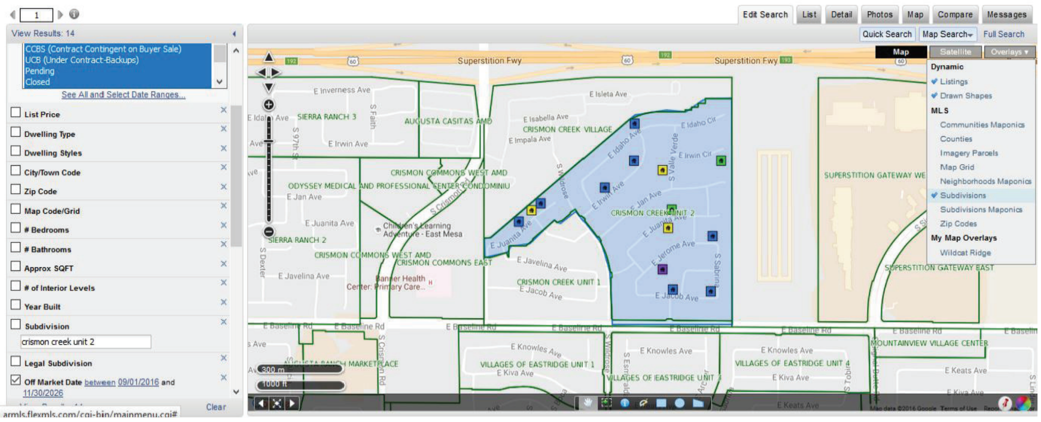
NEIGHBORHOOD SALES ACTIVITY REPORT

In Monsoon Tax Records search for the client's address, confirm in tax records that information is accurate. If no – please contact client and scrub for current address, update in CRM and MLS. If yes – take the subdivision name and enter in "Subdivision" in the MLS search. Other search criteria: Status: select all options; Off Market Date: set back 3 months from today's date.

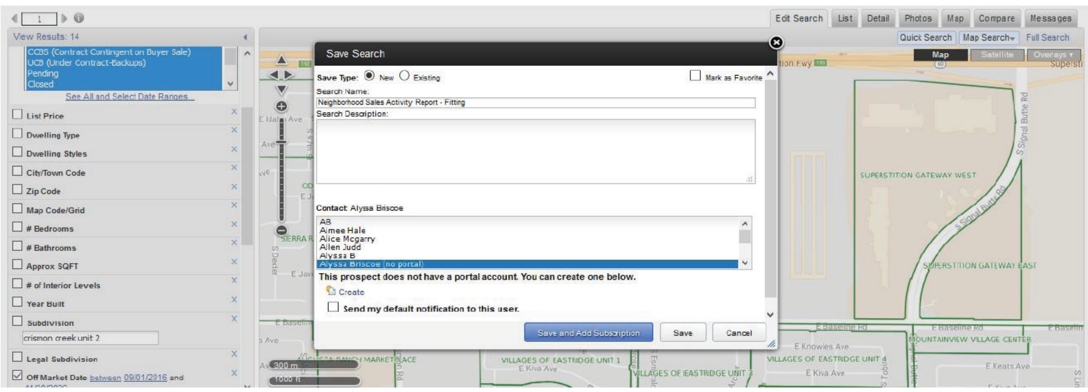




Select the "Map" tab of the search, from the "Overlays" dropdown menu select "Subdivisions." Using the "Draw a Polygon" option at the bottom of the map, outline the subdivision. Go back to the "Edit Search" tab and deselect "Subdivision"



Once the search is created select "Save" above the map. In "Search Name" enter *Neighborhood Sales Activity Report – Last Name.* Make sure the correct contact is selected and click "Save & Add Subscription". Click "Ok" on the pop-up box concerning the Portal, this will be addressed soon.



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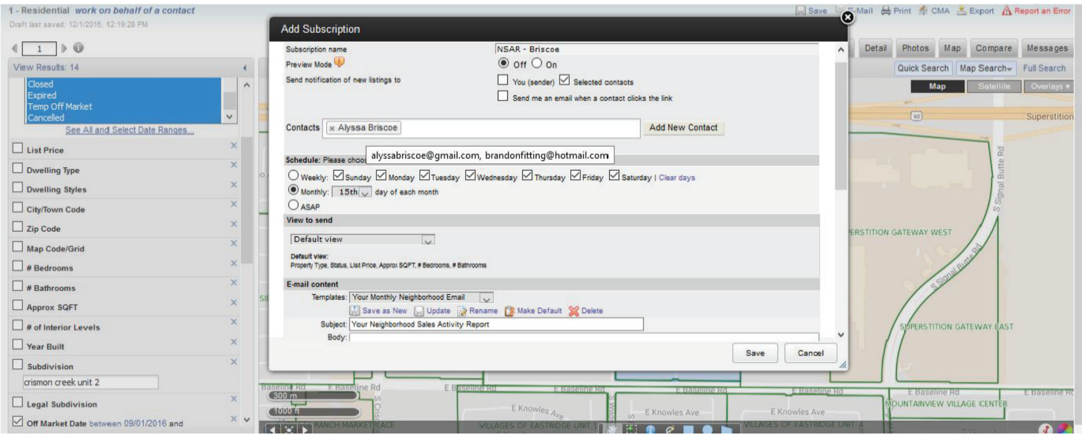
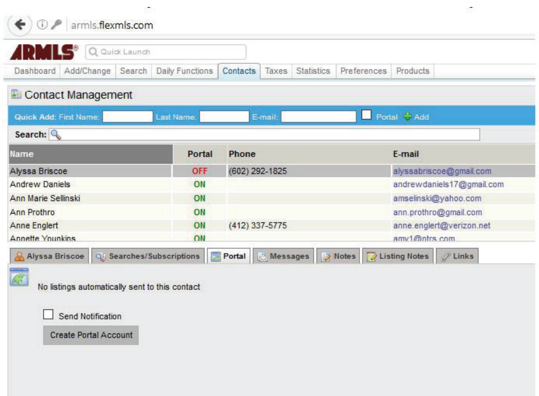
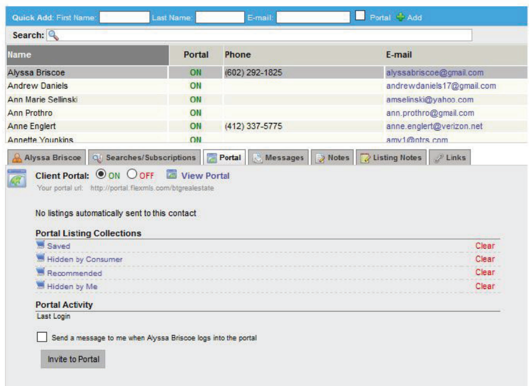
NEIGHBORHOOD SALES ACTIVITY REPORT

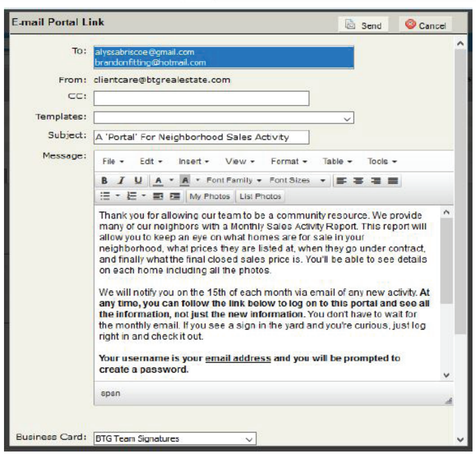
In the “Add Subscription” window, update the subscription name to NSAR – Last Name. Make the following selections: Preview Mode: Off; Send Notification of Listings to: Selected Contacts; Schedule: Monthly 15th Day. Under “Email Content – Templates” select “Your Monthly Neighborhood Email” then save. Select “Return to Contact Management” to be directed back to your client’s info.



Select the “Portal” tab, then “Create Portal Account,” Client Portal should now be tagged “On.” Select “Invite to Portal,” in the Email Portal Link pop up, make sure all contacts are selected in “To;” if you added a secondary contact such as a spouse, it will not be included by default and will need to be manually selected. Remove contact info from “CC” and click “Send.”

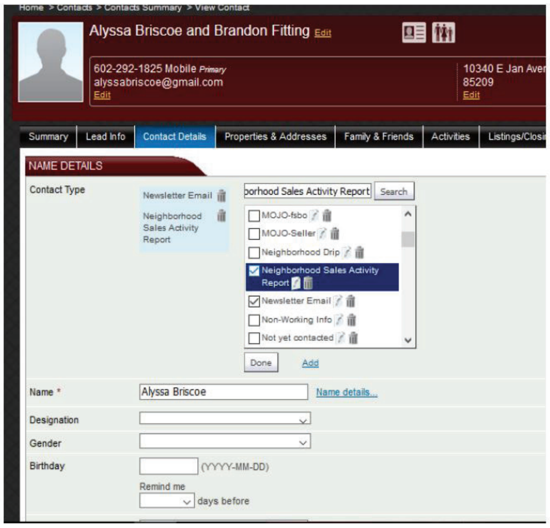


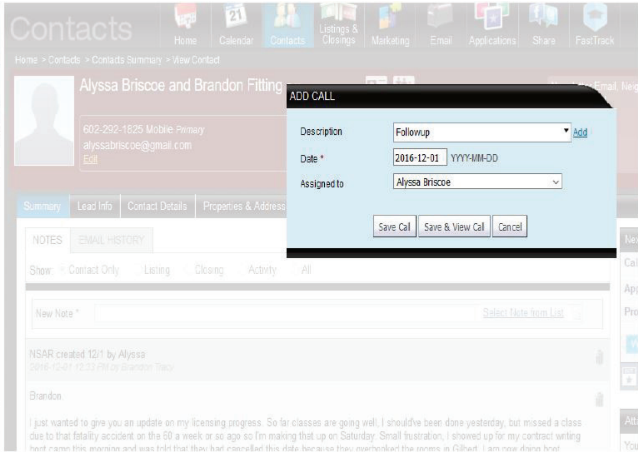




NEIGHBORHOOD SALES ACTIVITY REPORT

Update CRM with “ Neighborhood Sales Activity Report” tag, click Save Contact Details. Assign “Follow Up” task to confirm that client received portal invitation.





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