

Keller Williams University

Lead Generation
36:12:3

Power Session 5:
Working with Mets

Julie Fantechi

Maximizing Your “Metwork”

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Power Session 5: Working With Mets

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Power Session 5: Working with Mets

In this Power Session ...

- [1] Introduction*
- [2] Who are Mets?*
- [3] What is “Networking”?*
- [4] Working with Mets*
- [5] Referrals Through Your Network*
- [6] Final Thoughts*
- [7] Putting It All Together*

Notes

Introduction

Ground Rules

1. Arrive to class on time and return promptly from breaks.
2. Move quickly when you are instructed to form small groups or partner with someone to role-play.
3. Limit your side conversations.
4. Turn your cell phones and pagers to vibrate or OFF.
5. Feel free to stand and walk around if you find yourself getting tired.
6. Accept the reality of time and participation.
7. Respect the different learning styles and opinions of others.
8. Help each other learn because none of us is as smart as all of us working together to improve our skills and knowledge.
9. Consider everything we discuss confidential. What is discussed and role-played behind closed doors *stays* behind closed doors.
10. Have fun!

How You Will Learn

Learning Methods

1. In this manual, you will find:
 - **Models and systems** that are tested and proven ways of accomplishing Big Goals.
 - **Exercises and discussion** that allow you to test new skills and clarify your thinking in a safe environment.
 - **Stories, lessons learned, anecdotes, and advice** from top agents who offer invaluable insights.
2. Your classroom learning experience will be enhanced by:
 - **PowerPoint slides** to help keep you on track with the topics inside the course manual.
 - **KWConnect videos** to enrich your understanding of the course material. Watch for the camera icon in your course materials.
 - **Your classmates and instructor.** Don't underestimate the value of what you can learn from your peers, who ask great questions, who share their experiences, and who participate in exercises with you.

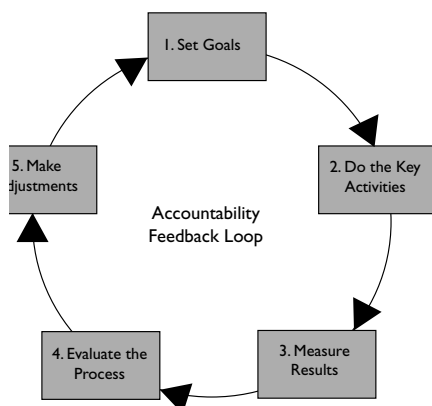


Accountability Methods

Accountability is, in the KW experience, the most crucial part of goal achievement. To support your goal setting, we recommend you:

1. Develop a Lead Generation Action Plan. At the end of this course, you will create a plan that outlines the specific actions you will take to achieve your lead generation goals. You will also create a calendar that helps you schedule your specific activities into your daily 3 hours of lead generation time.
2. Select an accountability partner or program to help you measure, evaluate, and make adjustments to your Action Plan. Look to the following resources for an accountability relationship:

- KW MAPS Institute individual and group coaching
- Market Center Productivity Coach
- Team Leader
- ALC Members
- Peers



Where You Are Today

Exercise

Where are you today with your lead generation efforts? Get into the habit of taking accountability for your actions and your progress. Take time to share with your instructor and your peers your aha's, your challenges, and your next steps.

Directions:

1. List the lead generation activities you completed during the last 24 hours.
2. What were your aha's?
3. What were your challenges?
4. Discuss what you will do differently in the next 24 hours.

Time: 10 minutes

1. Lead Generation Activities:	Time Spent on Activity
2. My aha's from these activities:	
3. The most difficult part of these activities:	
4. What I need to work on:	

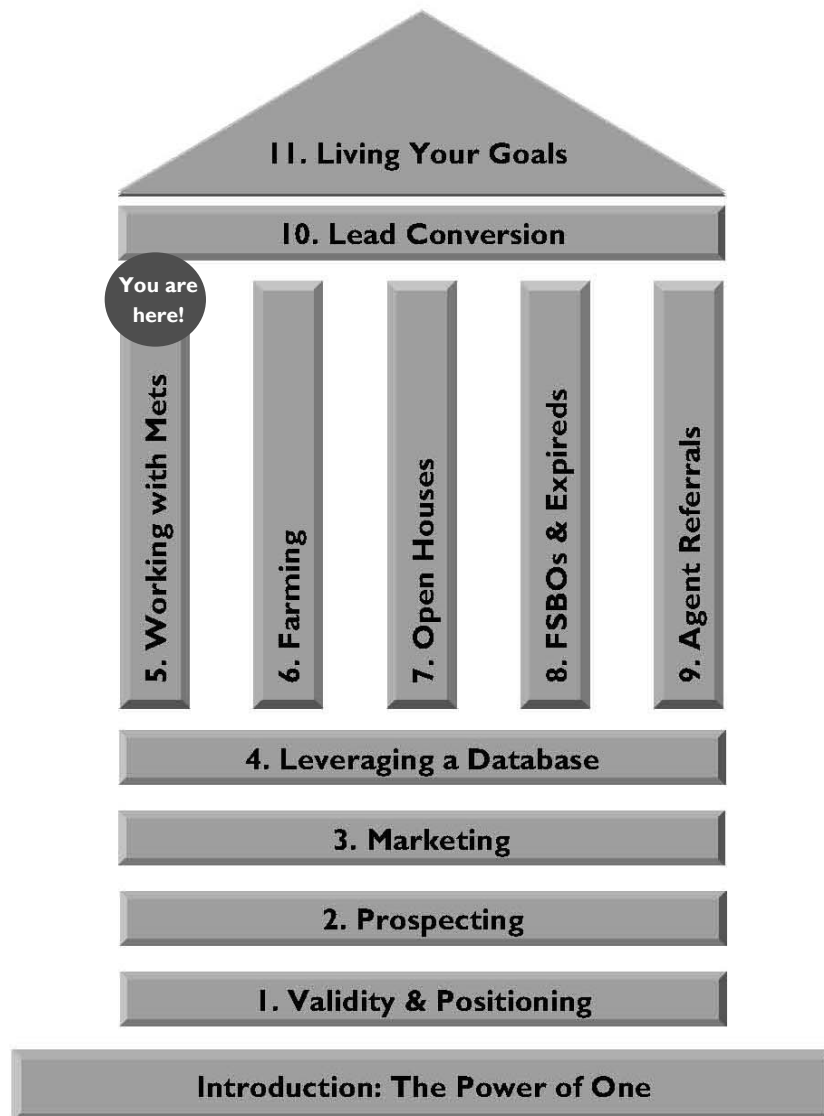
Introduction

Why You Are Here

At this point, you have built a solid foundation of understanding about Lead Generation 36:12:3—the critical mindset of a lead generator, the basic strategies of prospecting and marketing, and the power of a contact database. With *Power Session 5: Working with Mets*, you will learn how to make the most of those you know through the use of proven systems and models, helping you turn your “Network” into a future wealth machine.

Discover how to effectively develop systematic 8 x 8 and 33 Touch marketing action plans that will enable you capture top-of-mind status with your Mets—ensuring a constant stream of referrals and both new and repeat business.

Lead Generation 36:12:3 Course Map



Mets—Use them or lose them

Read, underline, and share ...

Your Mets database is of little use to you unless you are staying in touch with it on a regular basis—mailing, calling, visiting and always reminding them that you are a real estate agent who works by referrals.

Rick Geha, a Mega Agent and KWU Master Faculty trainer in Fremont, California, states it plainly. “Your Mets database is a future wealth machine for you. Our problem is we ignore it. We think because we are so charming and good looking, and we are real estate agents, people will remember us forever, even if we don’t talk to them. But the human mind will forget you—every 16 days! **It is not up to them to remember you are a real estate agent. It is up to you to remind them you are an agent!**”



National Association of Realtors 2006 statistics tell us that buyers and sellers do not speak to many agents before selecting one to work with. In fact, 87 percent interview just one or two agents before selecting one. At this critical moment of decision, it is crucial that you have already established top-of-mind status. How will you do this? Consistency and a systematic approach are the keys to effectively reminding your database that you are a real estate agent BEFORE they hit day 16 and you start to fade from their memory. Your 8 x 8 and your 33 Touch marketing action plans are the tools you will use to get into people’s heads—and stay there.

What Will Make This a Great Training Experience

-
-
-
-
-

Notes

Who Are Mets?

To get you into the right mindset, let's answer that question by asking another:

Question

Who isn't a Met, really?

Unless a person is a complete stranger to you and classifies as a Haven't Met, they are a Met: anyone with whom you've had personal contact—by phone or in person—and whose contact information you've collected and fed into your database. Remember, the moment you make personal contact—in person or by phone—a Haven't Met becomes a Met. That's why they are called *Mets* instead of *Friends*, *Past Customers* or even *Knowns*. The goal is to turn them into people you know, into friends, and eventually into past customers.

Truth

Everyone counts. Everyone matters.

“Don't kid yourself; you can grow a really big business by just working with Mets.”

GARY KELLER
COFOUNDER AND CHAIRMAN
KELLER WILLIAMS REALTY
INTL.
AUSTIN, TEXAS

Your Mets consist of those you've met today and those you've known all your life:

- Your Mets are those you've done business with or who do business with you.
- Your Mets may be parents of a friend or of a child.
- Your Mets are all the contacts you have generated going about your real estate business: past customers and contacts made through open houses, FSBOs, Expireds, and other Agents are all people you can call Mets and add to your database.
- Your Mets are the regulars at your favorite coffee shop.
- Your Mets are the people in your community association or religious association

Your database of Mets will grow over time as you meet potential home buyers and sellers. But it should also grow through your intentional efforts. Cultivation of Mets is never ending. Gene Rivers, a consummate networker in Tallahassee, Florida, has found that an all day, every day approach works for him, “I have built my career around networking for business, seeing people I know on a regular, social basis and meeting new people in the process. It's something I'm comfortable with, so it is easy for me to do.”

Know Your Mets

Organize your Mets into the different categories below. When you first meet or establish contact with someone and enter their name and information into your database, you want to make sure you properly label them. This will help you purposefully build relationships and create specific, targeted action plans.

Group	Definition	Who do you know?
Network Group	Individuals who know you because you have met them either in person or by phone. <i>Might do business with you.</i>	
Allied Resources	A very select subset of your Met Group who are in real estate-related fields. Individuals you expect either to do business with or to receive business leads from every year—usually, multiple times. <i>Will/or has done business with you.</i>	
Advocates	People who not only have done business with you in the past and will continue to do so in the future, but <i>will actively bring other people to you to do business</i> , as well.	
Core Advocates	Not only can and will do business with you, but they are well placed—owner of a sports team, executive at a large corporation, a builder, etc.—and <i>will send you a steady stream of clients.</i>	

Grow Your Mets

Increasing the number of people in your database is an all day, every day activity. Here are some suggestions to keep it growing

- Get involved—join organizations in your community and volunteer your time.
- Attend networking events in real estate or through your chamber of commerce. If you speak at a local Rotary or Lions Club on any subject, especially the current status of the real estate market, you will have an opportunity to be ‘known’ by many people.
- Call all of the newspapers within 50 miles of your home area and volunteer to supply any information they may need for stories and articles. Then get your name in the paper and be quoted as an “expert.”
- Be approachable—having your logo on your car or shirt will draw people to you.
- Feed everyone you meet through FSBOs, Expired Listings, Open Houses, Floor time, Geographic Farming, etc. into your database.
- Get out there!

Exercise

Let Your Fingers Do the Walking

In *Power Session 4, Leveraging a Powerful Contact Database*, you identified categories of potential contacts by going through the Yellow Pages.

1. How many names did you feed into your Database? _____
2. How many of those names have you actually contacted? _____

Time: 5 minutes

How Many Mets Do You Need?

As already stated, there is no limit to the number of Mets you can work with. However, with your 36:12:3 goals in mind, it may be useful to determine the minimum number of Mets (currently in an 8 x 8 or 33 Touch action plan) you will need to reach your goals.

Exercise

How many contacts should I have in my Metwork?

The Millionaire Real Estate Agent tells us that over time and through consistent contact you can expect 2 sales for every 12 names in your database, one from repeat clients, one from referral business.

1. Based on that ratio, use the following formula to determine the number of contacts you will need:

Closed Sales Goal _____ x 6 (12:2 ratio) =

_____ Contacts in your Mets Database

2. Write this number down on a postcard and put it on your computer ... dashboard ... bathroom mirror ... until you reach it. Then work on exceeding it!

Time: 5 minutes

How Many Mets Do You Want?

There are no limits to your potential sales growth as a real estate agent. As the chart below illustrates, a consistent approach to working with your Mets will ensure a consistent return. Remember that your Mets will grow with every transaction you complete, but rapid growth and a corresponding increase in income are yours for the having if you commit to expanding your Mets through your prospecting efforts, and then build relationships with them through the 8 x 8 and the 33 Touch marketing action plans. While your conversion rate may differ from the chart below, the idea remains the same—more is better.

“Size matters.”

*GODZILLA
INTERNATIONAL MOVIE STAR*

# of Mets	# of Transactions	Gross Income (assumes 7,500 average commission from an average sales price of \$250,000)
50	8.3	\$62,500
100	16.6	\$124,500
150	25	\$187,500
200	33.3	\$249,750
216	36*	Complete 36:12:3 and this could be you: \$_____
250	41.6	\$312,000
300	50	\$375,000
350	58.3	\$435,000

* YOU do the math!

Based on your average commission, how much will you earn when you achieve 36 transactions?

Take note: This level of production can only be achieved when your target number of Mets has completed an 8 x 8 marketing plan and is in an ongoing 33 Touch plan.

Notes

What Is “Networking”?

Successful business people must consistently network to make contacts, generate business, and maintain relationships.

Myth

If you build it, they will come.

Truth

All businesses must drive their customers to them.

In real estate, where many established agents rely almost exclusively on repeat business and referrals, the above statement is especially true. The good news is that by diligently working your Mets through the systematic use of the 8 x 8 and 33 Touch Marketing Action Plans, you will drive people to your business through your prospecting and marketing activities. Then you can watch your Mets turn into appointments, referrals, repeat business ... and closed contracts! It's all about working your Mets—or *Networking*.

Bruce Hardie of The Hardie Group knows a lot of people in Spokane, Washington, now, but that hasn't always been the case. When Bruce started in real estate, he had just moved from Australia and knew almost no one in town. He wanted to change that fast and get face-to-face with as many people as possible, as quickly as possible.

He chose to host open houses, collecting contact information from the people who attended and putting it into his database. In fact, he put *everyone* he came across into his database. He used this simple script: “I send my friends and customers information on the real estate market from time to time. Would you be interested in receiving it?” If they said yes, he replied, “Great! What's your address and phone number?”

After ten years, Bruce has a Mets database of 4,700 people. Early on, he contacted everyone in his database once or twice per month. Today Bruce capitalizes on proven marketing action plans—the 8 x 8 and the 33 Touch—to stay in touch. He phones his core group of Mets at least four times per year and persistently asks for referrals. When he meets new people, he puts them on an 8 x 8 to initiate a new relationship.

Bruce now runs a team of twelve that closed nearly 200 transactions in 2006.



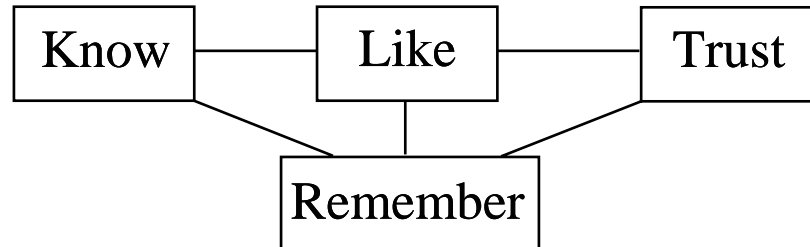
KELLER WILLIAMS SURVEY
2007

Networking works. Fully 96% of Mega Agents choose Networking as one of their preferred Lead Generation strategies because it gets results—Megs consider it 77% more effective than other strategies!

That's the power of Networking!

Why Is Networking Important?

I. People choose to do business with those they ...



People first and foremost have freedom of choice when it comes to selecting their real estate agent. You have to earn the right to their business. How do you do that?

- Stay in touch with them on a regular basis to communicate your professionalism and value, so they *know* you and *know* that you are in the real estate business.
- Establish yourself as honest, hardworking, and caring so they come to *like* and *trust* you.
- Don't wait for business to come to you. Get in front of people you know. Get in front of your Mets on a regular basis to remind them of your value—what you can do for them, your problem-solving ability, your knowledge, and your commitment to them so they *remember* you! “Don't be a Secret Agent!” as Doris Carlin, top-producing agent in Joplin, Missouri, reminds us.

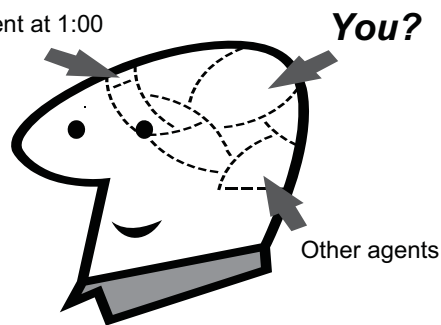
2. Achieve mindshare and be the first person they think of

Truth

It's not who you know, it's who knows you.

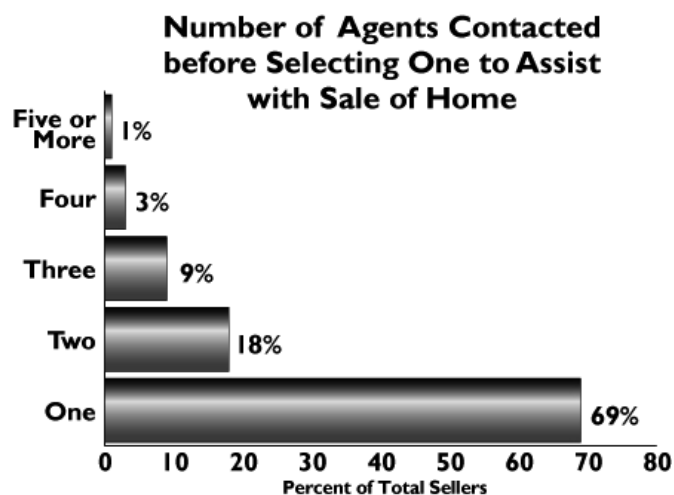
Your success in real estate will be in direct proportion to the number of people who think of you when they think of real estate. If you want business, you must be top of mind, and to be top of mind you must communicate persistently and consistently with your Network by making contact every month (using your 8 x 8 or 33 Touch), so you are the first person they think of when they think of real estate. In other words, if you stay in touch with your Network, you will get the first call and the first appointment—and in all likelihood be the agent who gets the listing.

Appointment at 1:00



**Who is going to the appointment:
You, or another agent?**

National Association of Realtors 2006 statistics tell us buyers and sellers do not speak to many agents before selecting one to work with:



Brad Korn, aka “Mr. 8 x 8 and 33 Touch,” of The Korn Team in Independence, Missouri, looks at it this way, “My job is to get the interview. I know that if 69 percent of all sellers talk to one agent, and I’m sitting at the kitchen table talking to them, I’m going to get the listing 69 percent of the time.” The battle lies in getting to the kitchen table, not once you get to the kitchen table.

Truth

You must stay in touch.

“It’s like your mortgage payment. You have to do it. You have to mail your mortgage payment, or you’re going to lose your house. You have to mail to your database, or you’re going to lose your business. That is your foundation. No matter what.”

Out of sight *is* out of mind. People need to be reminded that you are in real estate—don’t fall out of touch with people who have the potential to supply you with a consistent flow of repeat and referral business.

- Many of the people who know you may remember you in other ways than as an agent.
- They may remember you when they themselves need help with real estate but fail to remember you when someone they know has a need with real estate.

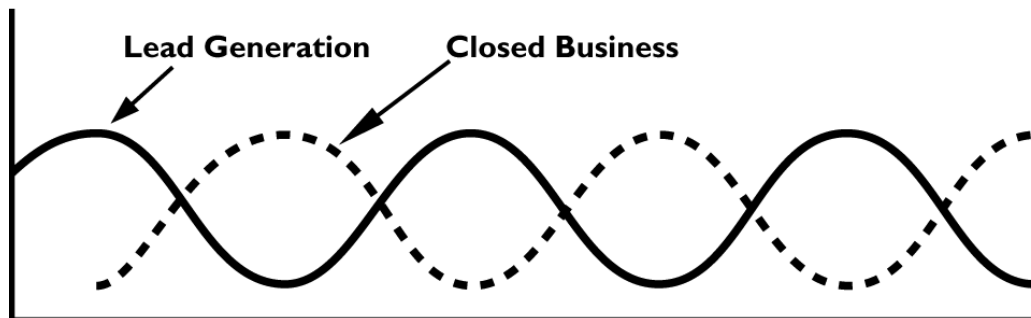
“The more contact and communication you have with a person, the stronger and richer the relationship becomes,” explains author Jay Abraham in *Getting Everything You Can Out of All You’ve Got*. “In business the secret to keeping and growing clients, as well as growing a career, is to keep continual and meaningful communication with everyone important to you.”

JANA CAUDILL
THE JANA CAUDILL TEAM
CROWN POINT, INDIANA

3. Your Mets can get you off the real estate roller coaster

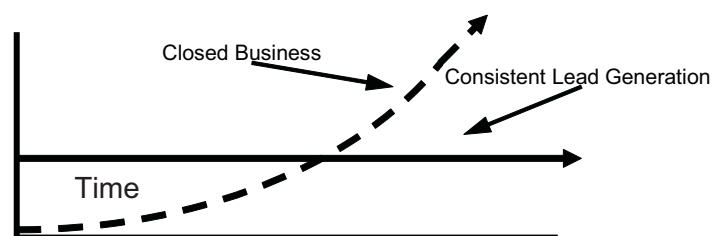
Many agents tend to lead generate when business is slow. Once business picks up however, they cut back on lead generation in order to service their new customers. And thus the dreaded ride on the real estate roller coaster begins—because once the business they generated begins to slow down again, they start a new round of panicky lead generation. This is what your business will look like when leads do not come in consistently.

Real Estate Roller Coaster



Your pipeline of leads needs to be full at all times, and by leveraging your Mets database you will be able to generate a steady flow of leads and stop going back to square one in your business over and over again. You'll never be without immediate prospects for buyer or seller business and your lead generation business will look like this:

Lead Generation Takeoff



“The question is, do you have 10 years experience, or have you experienced your first year ... 10 times.”

*DAVE BESON
FEATURED SPEAKER
NATIONAL BOARD OF
REALTORS*

Notes

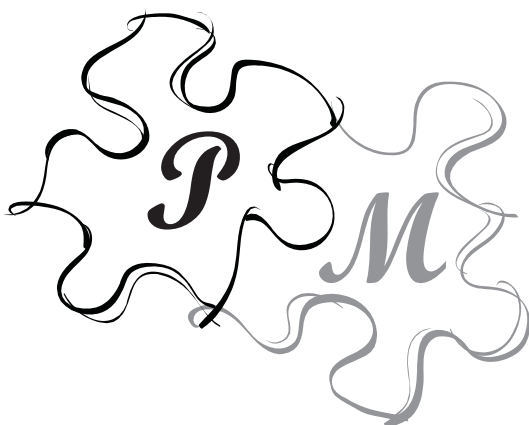
How to Metwork

Real estate is both a numbers game and a contact sport. To effectively lead generate from your Metwork, you'll be "touching" the people in your database in a systematic way; that is, making contact with as many people as possible. Our research with top agents is clear—all your Mets should be in a marketing action plan: the 8 x 8 or 33 Touch.

Your touches will be a mix of prospecting and marketing, and to work properly they must incorporate that balance.

Prospecting

Making contact through phone calls and visits to ask for business.



Marketing

Letters, postcards, emails, personal notes, newsletters, reports ... sent purposefully and systematically to establish mindshare.

The very name 'marketing action plan' may seem to put an emphasis on mailings, but beware of shying away from making personal contact. Your calls and visits are the glue that will hold these programs together and give them meaning. Furthermore, it is much easier for a growing agent to go out and generate business through their Metwork, rather than spending the time and money to generate large scale marketing programs.

Jean Grubb, a successful agent in Austin, Texas, agrees. "Just sending out stuff doesn't cut it. You may get some response, but the long term relationship is so much better if you follow up with phone calls."

Have you ever tried to finish a puzzle only to realize you are missing one of the puzzle pieces? You can spend hours constructing a beautiful, 1,000 piece puzzle, but just one missing piece will ruin the entire effect. It takes every single piece to complete the puzzle and create a pleasing picture.

"All lead generation is a funnel to Mets. Mets have a higher rate of conversion, so all your lead generation activities exist in order to generate Mets."

*DICK DILLINGHAM
DEAN OF KELLER WILLIAMS
UNIVERSITY – FACULTY
KELLER WILLIAMS REALTY
INTL.
AUSTIN, TEXAS*

Systematic Tools for Networking

“The name of the game is contact with prospective customers, new and old. The more time you spend touching them, the bigger your business will grow.”

*GARY KELLER
COFOUNDER AND CHAIRMAN
KELLERWILLIAMSREALTY INTL.
AUSTIN, TEXAS*

With a large and growing database, the best way to ensure that your touches are consistent over time is through these two proven action campaigns:

1. **The 8 x 8** Cements your relationship in the 8 weeks after you have made contact.
2. **The 33 Touch** Maintains that relationship over time.

Touches can be a call, a visit, a piece of mail, an email or an item of value. Gene Rivers, in Tallahassee, Florida, has a formula that he calls his Mail/Call/See: “I email or mail to my database, then call to follow up on what I sent them, then see who reacts, that is, who has an immediate need.”

Your mix will be customized to your different categories — Network, Allied Resources, Advocates and Core Advocates, which we will cover in more detail later in this Power Session.

The 3-hour habit

The preparation and implementation of the Marketing Action Plans is a vital part of your 3-hour daily habit of lead generation. For agents trying to reach 36 transactions, there is little more they need to do in terms of prospecting and marketing than to commit to the plans in this chapter. The transactions you complete and your daily real estate activities will all provide you with new contacts and contribute to the growth of your Network, steadily improving your odds of success with the 12:2 ratio.

Your 3 hours of lead generation may be organized differently from Monday to Friday (see calendar at end of Power Session), but certain tasks—such as your mailings, your calls and your follow-ups—will always need to be done. The variations will come in the amount of time dedicated to these tasks on a weekly basis.

Exercise

The 3-Hour Habit

As a class, discuss the sample 3-hour plan below.

1. What other activities could be included?
2. How could each hour be organized differently?

<p>PREPARE:</p> <ul style="list-style-type: none"> • Enter new Contacts in database • Print mailings • Practice scripts 	<ul style="list-style-type: none"> • • •
<p>ACTION</p> <ul style="list-style-type: none"> • Make calls • Take Notes • Leave messages 	<ul style="list-style-type: none"> • • •
<p>MAINTAIN:</p> <ul style="list-style-type: none"> • Organize notes on calls • Hand write personal notes 	<ul style="list-style-type: none"> • • •



Time: 5 minutes

The 8 x 8

How do you establish yourself in the number one spot under the category of “real estate agent” in the mental Rolodex of your new Mets? By introducing yourself and your business to all your Mets with an 8 x 8 marketing action plan. With this critical “mindshare” established, you can then move the prospect into your ongoing 33 Touch program.

The 8 x 8

The 8 x 8 is a high-impact, high-saturation technique that is designed to put you in the number one position in the minds of everyone you add to your Mets database.

The 8 x 8 is a combination of prospecting and marketing with

1. Personal visits
2. Phone calls
3. Items of value (dropped off or sent)
4. A handwritten note

“You have to be top of mind if you want to get that appointment. That’s where the 8 x 8 is going to come in. It’s going to put you in the top slot.”

*BRAD KORN
THE KORN TEAM
INDEPENDENCE, MISSOURI*

Sample 8 x 8 action plan

Basic 8 x 8 Plan		What will you do?
Week 1	Drop off a letter of introduction, your personal brochure, a market report, and your business card.	
Week 2	Send a community calendar, current market statistics, recipe card, or an inspirational card.	
Week 3	Same as Week 2, but choose a different mailing piece.	
Week 4	Make a phone call: "Hello, this is _____ with Keller Williams Realty. Did I catch you at a bad time? I won't take much of your time. How are you? Did you receive the _____ that I sent you? That's great. Did you have any questions? The reason I'm calling is to find out who you know that might be buying or selling a house soon."	
Week 5	Send one of your free reports.	
Week 6	Send a real estate investment or house maintenance tip.	
Week 7	Send a refrigerator magnet, notepad, or other usable and valuable item (not a throwaway) with your name, logo, and contact information on it.	
Week 8	Make another phone call: "Hello, this is _____ with Keller Williams Realty. Did I catch you at a bad time? I won't take much of your time. How are you? Did you receive the _____ that I sent you? That's great. Did you have any questions? As you can tell, I really hope that you will allow me to be your real estate agent for life. Also, who do you know that might be buying or selling a house soon?"	
Put the contact into your regular 33 Touch program.		

9 tips for implementing the 8 x 8 action plan

When setting up your 8 x 8 campaigns, it's important to keep a few points in mind:

1. As soon as you have added someone new to your Metwork, put them on an 8 x 8 program.
2. Schedule mailings before your calls. The benefit of making contact by mail is that it makes it easier for you to call (or drop by) and say, "Did you receive the _____ I sent you?" to break the ice.
3. Make your calls. The prospecting phone calls are essential to the success of the 8 x 8 system. If you eliminate all call and visits, it is not an 8 x 8.

Gary Keller regularly receives phone calls and emails from people both praising and criticizing the models and systems in the *The Millionaire Real Estate Agent*. Regarding the 8 x 8 plan, Gary says, "People will call and say, 'That 8 x 8 thing doesn't work.' I always challenge them and ask, 'So tell me how you are doing it.' I listen and I hear a lot about brochures, letters, magnets, and reports. They always say, 'I sent out eight things in eight weeks, just like you recommend.' 'What about the calls and visits,' I ask. Silence. 'You're not doing an 8 x 8! Once you start following the 8 x 8 system, call me back and we can talk about the results.'"



4. Always offer something of value.
5. Schedule the mailings and telephone calls on your calendar in your contact management software, so you will be reminded automatically when to launch the next touch.
6. Modify the 8 x 8 to work for you. The point is for you to be systematic as you make contact for the next eight weeks so that you quickly gain "top-of-mind" positioning with everyone in your database. Common modifications include
 - Instead of six mail-outs and two telephone calls, do four mail-outs and four telephone calls.
 - Substitute a personal visit for one or more phone calls.
 - Do twelve weeks instead of eight. But don't do less than eight weeks. Marketing research has demonstrated that you need a minimum of eight touches in a short period of time to establish a bond with someone.
 - For particularly hot leads, speed up your plan by making eight touches in three or four weeks. For expired listings, it could even be eight touches in eight *days*.

7. Once you have reached the end of an 8 x 8, move the prospect into a 33 Touch program to ensure that you stay in contact on a yearly basis.
8. Conclude every contact with a request for referrals (e.g., “Who do you know that may need to buy or sell a home?”), or a reminder to use your services (e.g., “When you think of real estate, think of me!”).
9. Take careful notes of what happened with each touch in your database. And before your next touch, review those notes. That way, when you call, you will be able to ask relevant and personal questions that will only strengthen trust and the relationship.

Customizing 8 x 8 action plans

Along with your basic 8 x 8, you should have customized versions of the 8 x 8 for various target groups (e.g., FSBOs) that speak to their needs and point them in the direction you want them to go. Having a more targeted message will greatly enhance the effectiveness of your lead generation.

Exercise

Customizing Your 8 x 8 Plans

1. Break into 8 small groups. Each group will be assigned a lead source that could benefit from a customized 8 x 8 program.
 - a. FSBOs
 - b. Expired/Withdrawn Listings
 - c. Follow up for Prospective Buyers
 - d. Follow up for Prospective Sellers
 - e. Geographic farm
 - f. Niche farm (i.e. demographic, specialty needs)
 - g. Open House visitors
 - h. Allied resources
2. In your groups, create a customized 8 x 8 action plan, using the blank form on the following page.

Time: 10 minutes

Customizable 8 x 8

Week #	I will make contact by:	I will include this creative and quick reminder <i>and</i> instructions* on how to give me business, including referrals:
1		
2		
3		
4		
5		
6		
7		
8		
Ongoing	Implement your 33 Touch.	

** For example: a sticker on the outside of an envelope, a bold graphic in my newsletter, photographs of people who have referred customers to me in my newsletter, a reminder at the end of a telephone call, etc.*

The 33 Touch

The 33 Touch plan is absolutely critical to any agent seeking to reach and surpass the level of 36 transactions per year. A full 33 Touch effort results in contact with your Mets every eleven days, on average. If that seems like too much, that's probably because it is ... and that's just the point.

33 Touch

The 33 Touch action plan is an “overkill, over time” approach that will ensure year round contact with your Mets. It means never having to worry that your Metwork will forget you or that some other agent will get their mindshare.

You will take three actions when dealing with Mets—call, visit, and mail. Your 33 Touch programs will help you achieve two goals:

- Get leads for new, repeat, or referral business
- Strengthen the relationship and move them further into your Inner Circles

Success with a 33 Touch is all about consistency over time; don't expect immediate success. It can easily take eighteen to twenty-four months for the program to start showing consistent results. However, top agents who have had a 33 Touch in operation for several years report that they can expect 2 transactions per year for every 12 people in their database (one will be a repeat sale and one will be a referral sale). Be persistent and the benefit will be nothing less than creating a solid group of lifetime customers.

*“I call my Mets
3 times a year
and mail to them
29 times, and I
get 70% of my
business from
people on my 33
Touch. So I have
to believe it is
effective.”*

*BOB GUEST
THE BOB GUEST TEAM
AUSTIN, TEXAS*

Sample 33 Touch Action Plan

Basic 33 Touch		What will you do?
18 Touches	A combination of emails, mailers, letters, cards, and drop-offs, which may include your business card, a letter of introduction, your personal brochure, market reports, Just Sold and Just Listed cards, holiday cards, your personal newsletter, recipe cards, property alerts, real estate news or articles, investing news or articles, community calendars, invitations, service directories, and promotional items.	
8 Touches	“Thank you” or “thinking of you” cards	
3 Touches	Telephone calls (send a “Thank you” card afterward)	
2 Touches	Birthday wishes (cards and, preferably, phone calls)	
2 Touches	Mother’s Day and Father’s Day cards	
33 Touches Every Year		

The 33 Touch: 7 Strategies for Success

I. Plan

Saying

Q: How do you eat an elephant?

A: In very small pieces.

Creating a 33 Touch plan from scratch can be a daunting task. Faced with what they perceive to be an insurmountable challenge, many people never even get started. However, by breaking your 33 Touch program into manageable pieces and implementing them over time, you can gradually build up to a full plan while still maintaining worthwhile contact with your Network.

- **Just do it.** The longer it takes you to get started, the more money you are throwing away. “You’re going to lose 6 months worth of opportunity, which might have generated you about \$50,000 dollars in commissions, if you try and perfect a plan,” warns Brad Korn of the Brad Korn Team, in Independence Missouri. Anything works, nothing doesn’t!
- **Delegate:** The more you take it out of your hands, the more likely it is to get done. Using a contact management system (CMS), establish **24** marketing pieces to be sent out on an annual basis—for example letters, postcards, and newsletters. (Email-heavy programs are less effective.) Other KW approved vendors can help with automation as well.
- **Make 3 calls a year:** Program a CMS to tell you when (MS Outlook will also place reminders on your calendar). You can use one of your phone calls to gather information. Ask for birthdates, anniversaries, correct name spelling, etc..
- **Write 3** handwritten notes after each phone call.

YEAR ONE	CONTACT	
24	Mailings	+
3	Telephone Calls	
3	Handwritten Notes	=
30	Touches	

From information generated through your phone calls and emails, you can add in birthday and anniversary greetings to reach 33-plus touches over time.

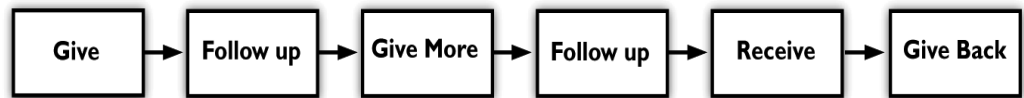
2. Give Value

“You are the best thing that can happen to these people. Stop concentrating on your commission and look at what you can do for your client. I get into curiosity and find out information that I wouldn’t have known if I hadn’t called and probed more deeply.”

*JEAN GRUBB
AUSTINAREA SOLUTIONS
AUSTIN, TEXAS*

Be a giver; always come from contribution. Coming from contribution means focusing on the long-term interests of your customers, not just the current deal. Steve Martin, a top-producing agent in Snellville, Georgia, advises, “Make sure that when you contact them, it’s legitimate, that it brings something of value to the table, and that it’s with them in mind. It’s not with you.” Coming from contribution gives new meaning to the old saying, “What goes around, comes around.”

Be a Giver



Some suggested items of value that will have meaning and will be important to your customers are:

1. Facts About Expired Listings
2. Getting Your Home in Top Selling Condition
3. The Home Buying Process
4. Homeowner’s Insurance and Your Credit History
5. How to Buy a Great House
6. Moving Tips & Checklist
7. Packing Checklist
8. Helping Children Cope with the Move
9. Real Estate Glossary
10. Renting vs. Owning
11. Security Tips
12. Seven Real Estate Truths
13. Six Selling Myths Uncovered
14. The Ten Commandments When Applying for a Real Estate Loan
15. Ten Signs It’s Time to Sell Your Home
16. Ten Steps to Selling Your Home
17. Ten Steps to Selling Your Home For-Sale-By-Owner
18. What’s Happening in Our Area?
19. How to protest tax evaluation.

3. Get personal

You must anchor a mental association of your name and face with those touches. Telephone calls and “pop-bys” are the glue that will hold your action plans together. Rick Geha is adamant, “A mailing program will work, but it will work much better if you get those 3 phone calls a year in there. Without those 3 phone calls you don’t have anything that brings it all together and wraps it up.”

Sending emails, direct mail marketing, and even handwritten notes are often not enough to get people to do business with you, but will provide you with a handy excuse for making your call, so schedule mailings before your calls. Again, the benefit of making contact by mail is that it makes it easier for you to call (or drop by) and say, “Did you receive the mailing I sent you?” to break the ice.

Example Scripts:

AGENT: Hello, this is _____ from Keller Williams Realty. How are you? Did you happen to receive the _____? Did you have a chance to look at it? The reason I’m calling is to find out who you know who might be buying or selling their house.

AGENT: Hello, this is _____ from Keller Williams Realty. How are you? Did you happen to receive the _____ that I sent you? That’s great. Did you have any questions? Just a quick reminder, if you happen to know of anyone who will be buying or selling, could you provide me with their name? Is there anything I can do for you today?

“The first goal of the call is to get an appointment. And if the appointment’s not there, try to get a referral. If the referral is not there, just simply strengthen the relationship. When you look at it that way, there is no way to lose. You can’t lose”

*BRUCE HARDIE
THE HARDIE GROUP
SPOKANE, WASHINGTON*

“A big mistake is to do one or two mailings and then wait for the phone to ring. That just won’t happen.

It’s all about frequency to a targeted group.”

*MARVIN JOLLY
TEAM LEADER
PLANO, TEXAS*

4. Have a Midas Touch

In differentiating yourself from your competition, you may find that some touches resonate more with your Network than others and bring you a greater return on investment. Make these touches a special part of your standard action plan.

Steve Chader of the Steve Chader Team, wants his Network to know he cares and has their best interests at heart. Every time he does a comparative market analysis, he calls his Network in that area and with a simple script lets them know he has done research on their neighborhood. He simply says, “I’ve been doing some research on the market in your neighborhood, and the values of the houses once again prove you made a great investment.” It’s an easy message to leave on the machine, and it creates a good opportunity for a conversation on investment if he gets an answer.



5. Be consistent

Complete each and every action included in the 33 Touch plan you are using. It cannot be random, on the 8th one month, then the 24th the next. You must constantly and consistently keep your name in front of them.

Don’t get impatient—results do not happen over night. Typically, the 33 Touch program will result in one transaction for every six names on your list after you’ve been doing it for about eight months to a year.

To help achieve consistency in your action plans

- Put your plan on autopilot as much as possible. A good contact management system can be programmed to automatically generate your letters and remind you to make phone calls. The more you learn to systematize—making it happen automatically or without having to think about anything, the less you will risk not getting it done.
- Set aside a specific time during your 3 hours of daily lead generation to make contact with your prospects.
- KISS—Keep It Simple Salesperson! They need to be touched, not bedazzled. Spurts of activity—fancy refrigerator magnets sent once on a whim will not produce the consistent results you will get from a steady, even if low-key, marketing action plan.

Bruce Hardie bought a car in 1994, and from that day forward kept in touch with the car salesman by mailing him something on a regular basis. In 2004, ten years later, that salesman called Bruce and sold a house with him for \$350,000. But here’s the interesting thing ... over those ten years Bruce purchased four cars from other salespeople and never once thought to call that car salesman. You see, the salesman hadn’t kept in touch with Bruce like Bruce kept in touch with him. Bruce benefited from maintaining consistent communication. The salesman did not.



6. Know your costs

How much does it cost you to Metwork? Depending on what stage of your career you are in, you may decide to spend more or less of your budget on prospecting and marketing. Keep in mind that prospecting should always be a mainstay at any stage of your career, and it costs less too—you can always save money by putting more emphasis on prospecting (phone calls, pop-bys) rather than marketing.

Cost Exercise I

Directions:

1. Re-note the number of Mets you need to reach your sales goals, determined in the exercise on page 10.:

METS	
_____	Names
÷ 12	
× 2	
= _____	Closed Sales

2. Record your average cost for a touch. If you are not sure, use *The Millionaire Real Estate Agent* average of \$0.50 per touch. _____
3. Determine the cost of your lead generation program:

METS	
a.	Every 12 people in your Mets database marketed to 33 times each year (33 Touch) = 2 sales. (One sale is a referral and one is repeat business.)
b.	Restated: 396 touches (12 x 33) = 2 sales.
c.	So, 396 touches x _____ (your average cost of a touch) = \$_____ for 2 sales. Divide this number by 2 for your cost per sale = \$_____.
d.	_____ Closed sales from Mets database (from step 1 above)
	× \$ _____ Cost per sale
	= \$ _____ Cost for your 33 Touch program/yr*
	*The cost of the 8 x 8 program is not included.

Time: 5 minutes

“We are constantly amazed at the quantity and quality of leads and referrals we receive from marketing to our Met group. Our 33 Touch campaign is our most cost-effective way to generate business.”

AARON ARMSTRONG
THE AARON ARMSTRONG TEAM
NASHVILLE, TENNESSEE

Cost Exercise 2

How much does it cost you NOT to Network?

NETWORKING	NOT NETWORKING
a. Average cost of home in your market \$ _____ b. Average commission from sale \$ _____ c. 33 touches x .50 = \$ _____ _____ In pocket (commission) - _____ Out of pocket (33 touch cost) = _____ Take home	a. Average cost of home in your market \$ _____ b. Average commission from sale \$ _____ _____ In pocket (33 touch cost) - _____ Out of pocket (commission) = _____ Take home

Time: 5 minutes

Moral: Do not be sparing with your Network or your touches. Each 33 Touch plan may only cost you a few dollars, but its actual value is many times higher.

- Do you always know which touch will be the Midas touch?
- Do you really have any Mets you can afford not to touch?

7. Modify the 33 Touch to work for you

The sample one-year 33 Touch plan is typical; however, this is only an example. You should customize your 33 Touch to suit your needs. The point is for you to be systematic as you make contact over the course of a year to solidify your mindshare position and build relationships.

Suggested modifications include

- Go for 33 touches, but if you fall short, set your floor at 24 touches per year (a minimum of 2 touches per month).
- Instead of sending Mother's Day and Father's Day cards, send inspirational quotes or market statistics.
- Every single touch should have a quick reminder and instructions on how to give you referral business.
- Instead of a quarterly newsletter, do a monthly newsletter (amounting to 12 mail-outs).

Exercise

Customizing your 33 Touch

1. Break into small groups.
2. In your groups, create a customized 33 Touch marketing action plan, using the blank form below.

Time: 10 minutes

Customizable 33 Touch

Qty.	Over the course of one year, I will make these touches:	I will include this creative and quick reminder and instructions* on how to give me referral business:
33	Total Touches	

Networking to your circles

You will use a different mix of prospecting and marketing to achieve your action plan goals with the four different categories of your Mets database: Network, Allied Resources, Advocates, and Core Advocates. When you first meet or establish contact with someone and enter their name and information in your database, you want to make sure they are in the right category. These categories are not static, however. Some contacts will start in your network and move into your Inner Circles and become your Advocates, while some will start as simple contacts who eventually do business with you for the first time.

Mets Database Categories		
	Definition	Lead Generation Strategies
Network	People you have met in person or over the phone who <i>might</i> do business with you or refer business to you.	Put them into targeted marketing plans (8 x 8 and 33 Touch) in hopes of building a strong relationship and generating business in the future.
Inner Circles		
Allied Resources	People in real estate-related fields who you <i>expect</i> to do business with or receive business leads from every year.	Use marketing plans, as with your Network Group, but also meet them one-on-one (meals, parties, visits) several times a year. Refer business to them.
Advocates	People who have done business with you, will absolutely do so in the future, and who bring other people to you to do business.	Market to them as with Allied Resources, but plan to see the most influential ones at least monthly. Refer business to them.
Core Advocates	People who will only do business with you, and are also <i>well-placed</i> and will send you a steady stream of customers.	Market to them as with your Advocates, but also provide service to them that improves their business. Core Advocates are your most precious assets.

Your Inner Circles

Every entry in your database is important, at least potentially. But some entries are considerably more important than others. These are people who make up your Inner Circles: Allied Resources, Advocates, and Core Advocates. Your Inner Circles are the source of your referrals and the transmitters of your reputation. As a solo agent looking to reach 36 transactions in the coming year, you should focus on establishing and growing your Inner Circles. This is, in fact, one of the principal objectives of lead generation.

Allied Resources

Remember the old saying, ‘I’ll scratch your back if you scratch mine’? Your Allied Resources should be in a symbiotic relationship with you. They have a dual function; in return for giving them the opportunity to serve the needs of your customers, they should refer new business to you. Think of your Allied Resources as partners in your business. These vendors and service providers have the same customer base as you (i.e., homeowners, sellers, and buyers), and they have a Network too, putting them in a unique position to deliver qualified leads to you.

In past years, the National Association of Realtors surveyed home buyers and sellers about what products and services they used that had been recommended by their agent. Eight out of ten home buyers reported they received recommendations from their agent for products and services. More than half reported they used their agent’s recommendations in categories such as home inspector, title company, insect exterminator, appraiser, and mortgage broker.

Exercise

Who are your Allied Resources?

Directions:

1. List all of the Allied Resources that are in a position to provide you with leads. Use the table on the next page.
2. Jot down services you can provide them in exchange.

Time: 5 Minutes

“I’m coming from contribution. I’m happy to send people my business —my dry cleaning, termite inspection, roofing, whatever it is. I just want them to know that I would like some business in return.”

*RON WEXLER
THE RON WEXLER TEAM
CHICAGO, ILLINOIS*

Allied Resources			
Title Company Representatives		What can you provide that these people value?	
Loan Officers		What can you provide that these people value?	
Mortgage Companies		What can you provide that these people value?	
Property Inspectors		What can you provide that these people value?	
Attorneys		What can you provide that these people value?	
Accountants		What can you provide that these people value?	
Builders		What can you provide that these people value?	
_____		What can you provide that these people value?	

Working with your Allied Resources

- Be prepared to recommend one or more names to your customers for any need that they would be likely to have.
- Make sure that you visit one-on-one with each of your Allied Resources several times per year.
 - ♦ Educate them on how to communicate your value proposition to potential customers and set expectations of customer service for your customers that you refer to them.
 - ♦ Remind your vendors that your business depends on referrals; if they are not sending you business, you should not be recommending their services.
- You have choices when it comes to vendor recommendations, and you should exercise those choices wisely. If an Allied Resource is not meeting the service expectations for your customers, this reflects poorly on you, and you should reevaluate the arrangement.
- Survey your customers regularly to assess how pleased they were with the service received from your recommended vendors.

On Your Own

Who do I give business to?

1. Make a list of Allied Resources you most commonly send business to.
2. Track how many referrals you send them every quarter or year, and how many you receive in return.
3. Communicate these numbers with your Allied Resources to demonstrate the value of your relationship when asking for referrals.

	2006 1 st quarter		2006 2 nd quarter		2006 3 rd quarter		2006 4 th quarter		2007 1 st quarter	
	to	from	to	from	to	from	to	from	to	from
1. Allied Resource										
2. Allied Resource										
3. Allied Resource										

Advocates

Your service should connect with your customers in a way that makes them feel special. That's how you create fans, or what we call "Advocates." Advocates are people who have done business with you in the past and were so pleased with the level of service you provided that they will not only remain loyal customers, but they will also be raving fans. Advocates can also be people who know you (friends, family, colleagues, etc.), and who are proud to refer you. Think of them as walking, talking testimonials for your business. Like the fan who says, "Have you heard the latest song by ...," you want your fans to say, "You've got a real estate need? Well, have you talked with . . ."

Working with your Advocates

- Don't entrust this loyalty to their memories; as time goes by, they are apt to forget about you and your great service unless you make the effort to remind them.
- Touch them regularly, through the mail, by phone, and with personal visits through your 33 Touch program (see example on page 49).
- Send them items of value regularly, and be sure to graciously acknowledge each effort they make to refer business to you—regardless of whether the referrals actually turn into a closed sale.
- Meet with your Advocates about once a month. These meetings should act not only as reinforcements of their advocacy, but as subtle networking appointments wherein you are looking for their help in establishing relationships with other Advocates and, more importantly, Core Advocates.

Exercise

Your Advocates

1. In the chart on the following page, list any Advocates—or potential Advocates—you may have.
2. How many of your Advocates have you met within the past month?
3. How do you plan to meet with them in the coming month?

Time: 5 minutes

Advocate's Name	Met with Them Last Month?	Next Meeting?
	0	
	0	
	0	
	0	
	0	
	0	
	0	
	0	
	0	
	0	
	0	
	0	

Sample 33 Touch: Advocates

You can vary your standard 33 Touch plan for your Advocates to include items of value and more personalized touches. We will examine a personalized Advocate Appreciation 33 Touch plan in more detail when talking about referrals.

12	Newsletters.
5	Holiday cards. If you throw an annual Client Appreciation Party, you might send the invitation along with one of the holiday cards.
5	Telephone calls. You should be checking in (“How are you?”) and asking for referrals (“Who do you know?”).
5	“Great Talking to You” or “Thank You” notes as follow-ups to your phone calls or meetings.
4	Personal Observance Cards (birthdays, anniversaries, Mother’s Day, Father’s Day, graduation, anniversary of their home purchase, etc.).
2	Usable giveaways such as a magnetic calendar or notepad cube.
33	Touches Total
→	Every single touch should have a quick reminder and instructions on how to give you referral business.

Core Advocates

If Advocates are your fans, Core Advocates are your concert promoters. Like Advocates, Core Advocates can be counted on to send you any real estate-related business they find.

Truth

Core Advocates are built, not found.

What distinguishes Core Advocates is that they are well-placed to provide you with a steady stream of qualified leads. With time and good effort, they can become the core of your business.

What are some potential types of Core Advocates for Agents?

1. _____
2. _____
3. _____
4. _____
5. _____

** Keep in mind that the target number of Core Advocates for Millionaire Real Estate Agents is five, and there's a reason for this. The kind of attention you will lavish on them would take too much of your time if you were to try to have many more than that.*

Working with Core Advocates

- Chart a course to develop Core Advocates by targeting specific individuals you would like to turn into Core Advocates and then reach them by getting into relationships with people who are already in relationships with them. They will get you in the door.
- Once you finally establish relationships with Core Advocates, you take on two important responsibilities:
 - ♦ Providing referrals from the Core Advocate with the highest level of service
 - ♦ Providing the Core Advocate some sort of service in return

What that reciprocal service might be is dependent on the person. If it is the CEO of a growing business, you may offer your services for referring potential employees, or advise them on real estate investing and create “millionaire in the making” groups and share *The Millionaire Real Estate Investor*. The point is to find out what their needs are and to fill those needs.



Janet Faulk and her husband Bobby, real estate agents in Lake Norman, North Carolina, purposefully planned a way to develop a group of Core Advocates, what she calls her “wealth determiners.” It all started with a concept they heard during Quantum Leap—‘pay it forward.’ They asked themselves, “How can we enhance our business and enhance other people’s lives at the same time?” Then they went to Family Reunion and saw Andy Andrews, author of *The Travelers’ Gift*. They knew they had found their vehicle and bought a case of *The Traveler’s Gift*, committing to paying it forward 1,000 times because it had so enhanced their lives. In the front of the book they wrote, “For the Love of Gabriel, please pay it forward 3 times.”

Next, Janet made a list of the most influential, top 20 business women in the Lake Norman area. She hand delivered that book to every one of them and simply asked them to read it. The response was phenomenal, and Janet realized she had a chance to maximize the potential of this group, so she sent out engraved invitations to participate in the first monthly meeting of the Lake Norman Professional Woman’s Group.

“We get together and brainstorm monthly and invite other people so we can help their businesses and other women to be successful.” She formed the group herself and is the only real estate agent. “Women in the group are doctors, lawyers, presidents of banks, and if anybody had real estate questions, they would just pick up the phone and call me. And from there, we talk about our family, and we talk about what we have in common. Nobody is going to call, ask you a question, and then hang up. I became the leading real estate authority on Lake Norman.”

Her coach told her she really needed only four Wealth Determiners. Out of her initiative, she got six.

“I offer them something of value, and I keep them by finding out what is important to them.” For example, one is a wine connoisseur and has a wine cellar in her home, so Janet bought her a case of Chianti. Another is into Pilates, and every month Janet simply downloads articles from the Internet to send to her. She sends them all gifts on a quarterly basis and never asks for referrals. “It is just a gift from me to them and, of course, it makes them think about Faulk Real Estate.”

Her attention to their interests has paid off handsomely. In 2006, the Faulk Team earned close to \$1 million in GCI; one third of that comes from six people.

Exercise

Your Core Advocates

Answer the questions below about Core Advocates.

1. What sort of services or benefits can you provide Core Advocates?

2. List any Core Advocates you have.

3. List a Core Advocate you would like to have, then think of someone you know who might be able to get you in touch with that Core Advocate or someone closer to them.

Time: 5 minutes

Notes

Referrals Through Your Network

Success Through Others

According to NAR, the average homeowner owns their home for six years. Roughly translated this means that for every six people you know, one will be selling their home in any given year.

Imagine that your Network is 216 people.

$$216 \div 6 = 36 \text{ deals in a year}$$

Now, for argument's sake, imagine that each one of them only knows six people. This means that each person knows of someone selling their home.

$$216 \times 1 = 216 \text{ deals in a year}$$

Of course, people in your Network know more than six people each. And even if you were only able to get a percentage of this business, you can imagine the benefits of working your database for referrals. Keep this in mind... According to the 2006 National Association of Realtors Profile of Home Buyers and Sellers, 43 percent of people chose their agent based on a referral from a friend, neighbor, or relative.

Working For Referrals

Top agents consistently receive half or more of their business through referrals. The reason for this is that anytime they speak with, email, write a note, or send a marketing piece to someone in their database, they ask for referrals. Their strategy is simple:

1. Educate
2. Ask
3. Reward

“I wanted to be famous as a real estate agent in my town. When I first started, I worked really hard to get listings. Soon I started getting referrals from people I knew. Then I started getting referrals from people I didn't even know. That's when I knew I was famous.”

*JANA CAUDILL
THE JANA CAUDILL TEAM
CROWN POINT, INDIANA*

I. Educate

How many people do you know who, even if they know you are an agent, could readily communicate to a prospective referral the benefits of using you as their real estate agent? While you know the value of referrals, do your prospects, customers, and past customers really understand?

Truth

Not everyone you know knows how you do your business.

It is your job to

- Educate them on the value you place on referrals.
- Explain what to do if they have a referral for you.

In Person and over the Phone

Each time you speak with someone in your database, you should be “educating” them. In other words, you should reinforce the notion that you are in the business of real estate sales, what the benefits of buying and selling real estate through you are, that you have knowledge to share, and that you prefer to do business on a referral basis.

An example of this might be:

AGENT: “I help people buy and sell homes. Since I work mostly by referrals, I make it my goal to exceed my clients’ expectations. And getting my business through referrals allows me to better concentrate on the needs of my clients instead of spending all of my time on marketing for leads.”

Use this script during your buyer presentation/consultation and your listing presentation/consultation:

AGENT: “I get most of my business from referrals from satisfied customers, like you! If you know of anyone who is thinking of buying or selling, please call me with their name. I’ll help them right away and let you know what happened.”

In Writing

Get into the habit of ending your letters and emails with:

AGENT: “If you happen to know of someone who is thinking of buying or selling a home, please don’t hesitate to call me. I promise I will follow up with them and provide the kind of service that makes you proud to have referred them to me.”

Also, think “Real” (the symbol and slogan you often see on dairy products). Think “Intel Inside” (the symbol and slogan you see on most computers). In every ad you place *and* document you send (such as “Thank You” notes and newsletters) to prospects, allied resources, and clients, include a small, eye-catching referral graphic:

You can also write an article about how much you value referrals in your newsletter.



TIP: *If you want your referral “logo” to stand out, use color and turn it into adhesive-backed stickers or magnets with your name and telephone number for easy reference.*

On Your Own

Educating your contacts

1. Determine what you will do to educate your prospects, customers, and past customers. Use this checklist to decide what you will do.
-

- Get into the habit of ending my telephone calls and letters (use "P.S." so it stands out) with:
 - ♦ "If you happen to know of someone who is thinking of buying or selling a home, please don't hesitate to call me. I promise I will follow up with them and provide the kind of service that makes you proud to have referred them to me."

- In every ad that I place *and* any document that I send to prospects, customers, and past customers (such as my newsletter, community calendar, postcards, reports), I will include a small, eye-catching referral graphic that looks something like this rough sketch:

- ___ Use color in my referral "logo."
- ___ Turn my referral "logo" into adhesive-backed stickers.
- ___ Turn my referral "logo" into magnets with my name and telephone number.
- Write an article about how much I value referrals in my newsletter.
- Use this script during my buyer presentation/consultation and my listing presentation/consultation: "I get most of my business from referrals from satisfied customers, like you! If you know of anyone who is thinking of buying or selling, please call me."
- _____
- _____
- _____

2. Ask

This concept is no different than “Ask for the sale”—something taught in any basic selling class. It seems so obvious, but some people don’t even think to ask for a referral. You can do this by telephone, in person, by email, or regular mail.

Truth

You won’t get what you don’t ask for.

Asking for business doesn’t have to be awkward if you can make it a win-win situation where you are both benefiting from the relationship. Use the script below:

Telephone or In Person

AGENT: “Hello! This is _____ from Keller Williams Realty. How are you? And the family? I’ve been thinking about you lately and wanted to let you know about a *Referral Appreciation Program* that I have going on. This is a program where you call me if you ever need a referral to an individual or professional service. In my line of work, I come into contact with a variety of professionals. Also, if you happen to know of anyone who is thinking about buying or selling a home, please don’t hesitate to call me, and I’ll take care of them. How does that sound? By the way, do you happen to know of anyone who is thinking of buying or selling a home now? And how about you ... is there anything you need right now?”

When you ask for a referral, it may be useful to define their search. Asking “Is there anyone you know” is like asking “Who do you know in the world?” The answer is inevitably, “I don’t know anybody.” Define their search for them and the results will be better, especially after multiple calls.

Telephone or In Person

AGENT: Hello, this is _____ from Keller Williams Realty. How are you? What's been happening in your life? *[open discussion]* You know, I just wanted to know if there is anything I can do for you, your family or a friend? I always want referrals from people whom I love working with and talking to. I'd love to work with your friends and your family. Is there anyone you know at work— or at the *sailing club*—who might be looking to buy or sell? *[Tailor the question to their lifestyle: type of work, affiliates, clubs or organizations or hobbies.]*

Email or Regular Mail _____

Write a very brief note that reads something like this:

Dear Ann,

I've been thinking about you lately and wanted to let you know about a Referral Appreciation Program that I have going on. This is a program where you call me if you ever need a referral to an individual or professional service. In my line of work, I come into contact with a variety of people.

Also, if you happen to know of anyone who is thinking about buying or selling a home, please don't hesitate to call me, and I'll take care of him or her.

If you have any questions or if you have a referral, please don't hesitate to call me.

Sincerely,
Deb Smith

On Your Own

Asking for business

Directions:

Determine what you will do to ask for business from your prospects, customers, and past customers. Use this checklist to decide what you will do.

- I will make contact with these people in my contact database *by telephone*.
Define what source (Allied Resources, Network, etc.) of people you will contact by telephone; if you prefer to list names instead, use the back of this page.

- I will make contact with these people in my contact database *in person*.
Define either what source (Allied Resources, Sphere, etc.) or category (A,

B, C, etc.) of people you will contact in person; if you prefer to list names instead, use the back of this page.

- I will use a script that reads something like this:

- I will make contact with these people in my contact database *by email and/or regular mail.*

Define either what source (Allied Resources, Sphere, etc.) or category (A, B, C, etc.) of people you will contact by email and/or regular mail. If you prefer to list names instead, use the back of this page.

- My note will read something like this:

3. Reward

Truth

Treat referrals well, but treat referral sources even better.

You must be systematic in your approach to rewarding a referral.

- Reward the right behavior. Your contacts aren't in the business of screening clients before they refer them to you—the act of referral is what should be meaningfully rewarded. That is what you want them to do again and again.
- Show your appreciation at every stage of the transaction: when you take the referral call, when you meet with the referral, when you do business with the referral, and when the transaction is complete. The important thing is to reward them right away, so they repeat the behavior soon.
- Recognition and appreciation are as important as gifts. You don't have to buy the referral relationship.
- Reciprocate when possible. Sending them referrals will generate referrals to you. Be a networker. Find ways to help with their business.

How to Reward

Practical Things Most People Value	Fun Things Most People Value *
1. Market statistics (month or year)	12. Handwritten "Thank You" notes
2. HUD-1 statement	13. Basket of goodies
3. Tax tips (fight tax appraisal)	14. Movie passes
4. Investment tips	15. Client appreciation dinner/party (sponsored by your vendors)
5. Home security tips	16. Personalized gift
6. New laws that impact homeowners	17. One-on-one lunch
7. DIY tips	18. Free hat/t-shirt (walking billboards)
8. Community calendar	19. Free massage
9. Vendor services (free lawn mowing)	20. Flower/plant/tree
10. _____	21. _____
11. _____	22. _____
	* There are RESPA restrictions on the dollar value of gifts.

Plan your rewards through a 33 Touch plan:
Advocate Appreciation

Customers who have referred business to you merit special attention if you want them to advocate on your behalf. Place them on a 33 Touch plan that will mirror your other plans but will **include unique items of value** to show your appreciation.

- The Advocate Appreciation plan should be used for those clients in your Inner Circle who either have referred business to you or have committed to referring future business (Allied Resources, Advocates, and Core Advocates).
- Items of value include such things as school calendars, New Year calendars, baseball or football schedules for their favorite team, or inspirational cards. To save time and money, plan and budget for your items of value prior to the beginning of the year.
- If a contact is currently on an 8 x 8 plan or another 33 Touch plan, cancel that plan and place them on the 33 Touch Advocate Appreciation plan as soon as they refer business.

Exercise

Your Advocate Appreciation 33 Touch plan

1. Look at the sample 33 Touch plan for your Advocate Appreciation on the next page.
2. Break into small groups.
3. Develop a customized Advocate appreciation 33 Touch program using the worksheet on the following page.

Time: 10 minutes

Sample 33 Touch: Advocate Appreciation

12	Newsletters. Send a monthly newsletter. Include items of value such as a school calendar, New Year calendar, football schedule, or inspirational items.
5	Holiday cards. If you throw an annual Client Appreciation Party, you might send the invitation along with one of the holiday cards.
5	Telephone calls. You should be touching in ('How are you?') and asking for referrals ('Who do you know?').
3	'Great Talking to You' letter. Occasionally, you will want to follow up your phone calls with a letter.
4	Personal Observance Cards (birthdays, anniversaries, Mother's Day, Father's Day, graduation, anniversary of their home purchase, etc.)
2	Usable giveaways such as a magnetic calendar or notepad cube.
2	Personal meetings, such as lunch, dinner, drop-by, etc.
33	Touches Total
➔	Every single touch should have a quick reminder and instructions on how to give you referral business.

Customizable 33 Touch: Advocate Appreciation

Qty.	Over the course of one year, I will make these touches:	I will include this creative and quick reminder and instructions* on how to give me referral business:
33	Total Touches	

** For example: a sticker on the outside of an envelope, a bold graphic in my newsletter, photographs of people who have referred customers to me in my newsletter, a reminder at the end of a telephone call, etc.*

Final Thoughts

The average person you see walking down the street will know approximately 200 other people. On the other hand, because of the networking you do as part of your real estate sales business, YOU should know more than the average person—as many as 300–400 people. Use them, don't lose them!

Networking works and is one of the easiest and most pleasurable ways to do business. People you already know are much easier to approach and eventually convert to closed contracts.

By making a connection with your Network through your systematic marketing action plans—the 8 x 8 and the 33 Touch—you are ensuring a steady stream of leads, referrals, and both new and repeat business.

Keep the financial rewards in mind. You may want to clip this table out and post it where you will be sure to see it. But don't limit yourself to these numbers, because as Gary Keller reminds us in *The Millionaire Real Estate Agent*, “Thinking big will take you to a higher place; in fact, it may help you become the very best you can possibly be. To be your best, think big and aim high.”

# of Mets	÷ 6 (12:2 ratio)	Gross Income (assume 3% commission from \$250,000 sale: 7,500)
50	8.3	\$62,500
100	16.6	\$124,500
150	25	\$187,500
200	33.3	\$249,750
250	41.6	\$312,000
300	50	\$375,000
350	58.3	\$435,000



Putting It All Together

Power Session Aha's

Your Lead Generation Action Plan

Your success in the discipline of lead generation is dependant on your daily habit of action. If you focus your actions, you will propel yourself forward to 36 transactions or more per year.

Use the Action Planning Worksheet on the following page to record numbers from both your current lead generation program and your future goals. Then determine what actions you will take to “close the gap” (if any) between your current state and your goals.

These are your focused actions. When specifying them, consider:

- Adopting lead generation activities that complement each other and suit your behavioral style and interests.
- Mastering at least three reliable lead generation activities that you will be able to rely on in your business.

Note next to each activity how often you will conduct it—is it daily, weekly, or monthly?

Lead Generation Action Planning Worksheet

	Current as of _____	Goal by _____	Activities to “Close the Gap”
Annual GCI:			
Annual Closed Transactions:			
Number of Mets in Database: Annual			
Number of Mets Added to Database (weekly)			
Number of Mets on 33 Touch plan			
Number of Leads from Mets			
Number of Closed Transactions from Mets			

The 3-Hour Habit

The Power of One

Focus on just one thing—lead generation.
Develop one habit—3 hours of lead generation every single workday.

Of the activities listed on your Lead Generation Action Planning Worksheet, which will you add to your calendar for this week?

By adding items to your calendar, you are time blocking. Time blocking means that you always know what your most important job is every day and that you commit to getting it done. It means that you are going to do what you must do: generate leads. You're going to call and meet people, prepare marketing materials, network, host open houses, and prepare seminars. And it means that whichever of these actions you decide to focus your efforts on, you are going to get really good at them over time.

There are just three simple rules you must follow to put the powerful daily habit to work for you. But beware that these must be adhered to and not taken lightly.

1. Time block 3 hours every work day before noon.
2. No skipping. If you must erase, then you must replace.
3. Allow no interruptions (unless they truly are emergencies).

Time on the task beats talent every time. And when you follow these three rules, you're making sure you put in the right amount of time on the right task.

Use the Calendar on the following page to time block your lead generation activities. What did you learn during today's Power Session that you would like to incorporate into your regular lead generation program? What did you list on your Lead Generation Action Planning Worksheet that you can start doing?

This calendar is your flexible draft. Sketch out how you will handle your time here. Then, add these activities to your real calendaring system—whether it's an electronic calendar, like Microsoft Outlook, or a paper-based calendar.



	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
8	8		8	8	8	8	8
9	9		9	9	9	9	9
10	10		10	10	10	10	10
11	11		11	11	11	11	11
12	12		12	12	12	12	12
1	1		1	1	1	1	1
2	2		2	2	2	2	2
3	3		3	3	3	3	3
4	4		4	4	4	4	4
5	5		5	5	5	5	5
Evening	Evening	Evening	Evening	Evening	Evening	Evening	Evening

