Scripting

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Sphere of Influence

Why We Don’t Take a Sales Approach with COI Clients

When calling your SOI clients, you want to lead with things that matter to them, that have no strings
attached and make them feel that you really care about them versus thinking of you as a telemarketer
or just someone looking for more business from them. Using this approach, leading with a genuine, caring attitude, you’ll find that the dollars will come naturally in and abundance.
People will remember how you make them feel, not necessarily what you say. When communicating
with people, you want to leave them with a great feeling as opposed to feeling relieved that they got off
the phone with you. You want to leave them with the feeling that it was nice to hear from you and that
you genuinely care for them and their well-being.
Making these calls with that mindset will set you up for success with your COI business.

SCRIPT 1: Clients You Haven’t Talked to Recently

Sometimes, we neglect to call our SOI on a regular basis, so this is a great way to reconnect and let them
know that you will be staying in touch on a regular basis.

Hey {COI name}, it’s {your name} with {team name}. {COI name}, I need to apologize. I haven’t spoken to you guys in a long time; time just seems to fly by. I really just want to catch up and say hi and I still remember like it was yesterday, when we went into the process of finding you guys that home, and I hope everything is going well. All is well?

Pause and wait for their response...

That's awesome! I'm glad to hear that you guys are doing great. Look, I will stay in touch, if that's ok with you. One of my goals this year is to make sure I stay in touch with people that matter to me and you're on that list. Again, I apologize for not staying in touch and reconnecting sooner. I look forward to talking soon. Have a great day and thanks for taking my call.
Your goal is just to chat and say hi and bye as quickly as you can with no catch. You want to make it clear
to them as well that you're not selling anything or asking for anything. It's simple, it's quick, and there
are no catches. You are bringing back the memory of a positive experience you have with that person
and that's all you really want to do at this point.

SCRIPT 2: Free Service for Friends & Family

With this script, it's all about a free service or something we can do for THEM, not what they can do for
US. By providing them with this type of information, we become their go-to person for advice and information on real estate. It's a great way to stay top-of-mind.

Hey {COI name}, it's {your name}, how are you? Listen, I wanted to let you know about a free service that I provide for friends and family. If you ever want an update on market value, because things change so quickly today, or maybe to know what your property is worth, or what something in your neighbourhood sold for, I can send you that information. There's no obligation. It's absolutely free. Again, I do this for friends and family, and I want to make sure that you know
that. Great chatting with you again and I'll talk to you soon.

SCRIPT 3: Building a Resource Network

This is a great tool for not only building a network of reliable resources your past clients can take advantage of, but also of expanding your business outside of your centre of influence.

Hello, how are you doing? The purpose of my call today is to ask you a quick question, {COI

name}. I find myself becoming a resource to my friends, family, and clients when people are looking for reliable contractors or home professionals. I'm asked quite often who I know that might be able to help them with something and I thought I'd take this opportunity to call my friends and clients and ask them for a referral in any type of business that may have delivered a fantastic or incredible experience to you or someone you know. Who do you know of that delivered a fantastic customer experience that I can refer to others? Your opinion means a lot to me.

Allow them to respond and then thank them and continue.

So, what is it that you really appreciated about that service?

Again, let them respond.

Would it be okay if you gave me the phone number of the {referred resource}, so I can give them a call?

They will give you the number.

Great! Thank you very much. I'll give them a call. I appreciate your help. And hey, I'm going to stay in touch with you! It's great talking to you again. And of course, please let me know if there is anything you need at all, anytime. Have a great afternoon and take care.

Again, it shouldn't be about you asking them if they want to buy or sell real estate or know of anyone
else who is buying or selling. There's a right time and a place for that. This is just a call to expand your
business through customers or clients you already have.

SCRIPT 4: Calling the Referred Resource

So, you've received the name and number of a great resource from a client. Now it's time to give them a
call.

Hi {referred source name}, {COI name} highly recommended you, and he says you're the best {type of contractor or professional} around. This means a lot to me because, as a real estate

agent, a lot of people ask my opinion and one of the things that quite often comes up is if I know a good {type of contractor or professional}. The reason for my call is to ask permission to refer you to people in the future.

Wait for the response. You'll usually be met with gratitude and agreement.

That's awesome! I would be happy to do that and again, you came highly recommended from {COI name} and if it's okay with you, I'll stay in touch with you as well. Great talking to you today.

Your goal is to leave them with a great feeling. Then you would follow that up with either an email or thank you note, thanking them for allowing you to refer them. It's important to remember that this is a referral from a client of yours, and you want people saying great about you all the time. Using techniques like this, they will naturally do just that. Do not sour this call by asking for business in return. The key right now is to stay in contact with that person and refer them! And when you do, you'll build a relationship that will naturally allow them, without question, to send you a lot of prospects.

Outbound Lead Script

In this call, you have offered information upfront, they have requested the information you have offered, and you now need to assess how to proceed. They may have requested a list of homes, a free report, or submitted their name and number on your website. This script can accommodate converting any of these leads.

Hello is (name) there please?

SPEAK QUICKLY *Hi (name). I'm calling from the _____ Team. I'm calling in response to your request for (some information on properties in the (area) or a free report on), and I wanted to let you know what we are preparing that for you and will sending it to (email address). Is that correct?*

OR

Hi (name). I'm calling from the _____ Team. I'm calling in response to your request for some information on properties in the (area). I see that you were on one of our home finder websites and we wanted to ensure you found what you were looking for. Did you get the information you needed?

Note: Do not ask, "How are you?" You only have a few seconds to let the client know you are calling them back in response to their request for information from you. This is the key to getting them to answer a few of your questions, because you have done something for them first.

Situational Analysis – Information Collection

1. *Are you open to all areas of [area names] or is there any specific areas you are focusing on?*

2. *Do you have a home to sell or are you looking to just buy?If they have a home to sell – Are you planning on listing first, or do you want to see what is available first?*

3. *When were you hoping to buy (or list your home) if everything works out perfectly?If they did not give a specific time – Well, If you found the perfect home, when would you be ready to move?If they are a longer time out… Are you hoping to be moved into your home by _____ or start the process by_____?*

If they are looking to research the market before selling or a first-time buyer and within 6 months, proceed to the buyer value proposition.

If they are looking to get a sign on their lawn first and within 3 months proceed to the seller value proposition.

If outside of these time frames, proceed to the buyer or seller follow up offers.

LOOK FIRST - (BUYER VALUE PROPOSITION).

Well <name>, we are the #1 team or one of the top teams in the area and we do have a great free service that I am confident will help you! 95% of the homes that most people get access to are only the average ones. The other 5% that represent the great deals are usually scooped up by Realtors and their friends. If you would like, I can get you on that list just to make sure that you don't miss anything when you are looking. Our list will also include powers of sales, estate sales and all of our team's properties before they hit the market to give you an advantage. Would you be interested in that information as well?

LOOK FIRST - (ALTERNATE BUYER VALUE PROPOSITION)

Well <name>, because we sell more homes then anyone in the area. We are able to offer a unique buyer service. Most great deals come from early access to listings before they hit the market. Last year alone there was over 179 new properties that our buyer clients had private early access to before anyone else. This is a clear unique buyer advantage and It's a free service we offer our clients. Oh and our clients also get access to bank sales, estate sales and other great deals. Would be interested in this information as well?

*if you do not have statistics to leverage, use your brokerage statistics or use the inbound value propositions.

IF SELL FIRST – (SELLER VALUE PROPOSITION)

Well (name), we are the #1 Team in the area and what we can do for you is provide a custom professional evaluation of exactly what your home may sell for in today's market. This professional evaluation will give you the confidence that the price you pick for your home is going to net you the most amount of money. Also, at this time we are going to review the things we do that average an additional 5% on the sale of your home. Would you be interested in this information as well?

4. *Do you have an agent in mind to help you with your move?*

If they say YES…

Are you 100% committed to working with that agent or are you open to hearing what additional services we are able to offer you?

Have you signed a contract with that agent?

If yes, ***END CALL ASAP.***

"*I am only asking because I am not sure if you know that because I work in a team environment, I can offer services that as an individual Realtor, I simply could not afford. Our buyer services are second to none and include power of sales, estate sales, and other great deals including inventory that isn't even on MLS yet. Would you be interested in this information as well?*"

BOOKING THE APPOINTMENT

If researching before listing or buying first:

Excellent what we do next is meet, to take down all your wants and needs. So what works better for you? A day, evening or maybe the weekend?

If selling first:

Excellent, all we need to do now is get together so we can give you all the details. When is the best time to do that, days, evenings or maybe the weekend?

After they choose days or evenings:

Would today/tonight or tomorrow work for you?

After they choose day, give 2 times:

Would [this time] or [this time] work for you?

After the choose time:

Okay so our appointment is set for (full date and time)

AFTER APPOINTMENT HAS BEEN SET

1. *(If buying first) Are there any other decision makers or anyone else involved in the search process?*

If no, go to 3 - if yes, than go to 2

(If selling first) Are there any other decision makers or is anyone else on title of the home? If yes go to 2 If no go to 4

2. *Does that time work for them as well?* If no, go to 2A, If yes go to 3. If they have home go to 4.

a. *When is a better time that would work for both of you?*

If they have a home go to 4. If no –

We do require for the first appointment that both people involved are present. From that point on, if you would like to take the drivers seat that is totally okay. Just for the first meeting we do require you both. What would usually work better for the both of you - days or evenings?

3. (If they do not have home) *Ok great, we are all set for (full date and time). Do you know where our office is located?*

800 King St W Oshawa ON. We are on the corner of Thornton and King St.

If first time buyer or no home to sell go to confirmation

(GIVE DIRECTIONS OR SWITCH APPOINTMENT TO THEIR HOME IF THEY OBJECT TO MEETING AT OFFICE OR BOOKING MORE THAN 72 HOURS OUT)

4. If looking first and they have a home – *Could you please confirm your address for me?* (if selling go to 5)

Great so we will be coming to your house at (confirm address), after we set you up for the emails, would you like me to give you a rough idea on the value of your home in today's market?

5. So can you tell me a little bit about your home? (style, bedrooms, baths, sq ft, recent updates, lot size, etc)

CONFIRMATION

After getting details or booking at office – *Can I text the number I called you on?*

If yes - *What I am going to do is text you from my personal number. That way if you (or you and..) have any questions before (full date) please feel free to give me a call anytime.*

If not – *Do you have a pen? What I am going to do is give you my personal number. That way if you (or you and..) have any questions before (full date) please feel free to give me a call anytime.*

Excellent (name) It was a pleasure speaking with you and we will see you (or you and..) on (full date)! We are preparing a lot of great stuff for when we get together and we really look forward to meeting you in person!

Close: Value Proposition / Seller Value Proposition / Follow-Up Offer

Inbound Lead