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.

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