

SOP: Realtor for Life – Post-Closing Client Care

Objective:

To build long-term client relationships through consistent and personalized post-closing outreach, creating lifetime value and referral opportunities from each transaction.

1. Initial Post-Close Touchpoint (Week 1 After Closing)

Purpose: Set the tone for the ongoing relationship.

- Send a personalized congratulatory message (email, text, or video).
 - Mail a handwritten **thank-you note** or drop off a small **welcome gift**.
 - Add the client to your CRM and tag as: Past Client, Year Closed, Gift Program, etc.
 - Schedule follow-up reminders for all future client care touchpoints.
-

2. Monthly: Client Newsletter

Purpose: Stay top of mind with value-based, non-salesy content.

- Send a branded e-newsletter with home tips, local events, market updates, and lifestyle content.
- Ensure it is mobile-friendly, visually appealing, and consistent in branding.

- Automate through tools like Mailchimp, ActivePipe, or your CRM.
-

3. Quarterly: Personalized Touchpoints

Purpose: Reinforce your relationship beyond email.

Choose one per quarter:

- **Phone call** or **video check-in** (“How’s the house working out?”)
 - **Pop-by gift:** Drop off a small seasonal item with a branded tag.
 - **Personalized notecard** with a brief life update and reminder you’re here to help.
 - **Mini-market update** tailored to their neighborhood (use if they may move again soon).
-

4. Annual: Home Anniversary Gift

Purpose: Celebrate a milestone and show appreciation.

- Send a **home anniversary card** with a small gift (e.g., \$10 coffee card, branded keychain, seasonal plant).

- Include a message like:

“One year ago today, you made a great move. I’m so grateful to have been part of it!”

- Track gifts and anniversaries in your CRM or a dedicated spreadsheet.
-

5. Seasonal: Calendar or Branded Giveaway

Purpose: Stay visible in the home year-round.

- Mail or deliver an annual branded **magnetic calendar, notepad, or home maintenance checklist**.
 - Include a message reminding them you're just a call away for referrals or questions.
-

6. Annual: Customer Appreciation Event

Purpose: Deepen community and create referral opportunities.

- Host 1-2 events per year (e.g., summer BBQ, movie night, holiday drop-in).
 - Invite all past clients via email, text, and social media.
 - Take photos, thank attendees, and follow up afterward to maintain engagement.
 - Track RSVPs and participation in your CRM for future invites.
-

7. Referral Nurture System

Purpose: Encourage and reward referrals.

- Always thank clients for referrals—no matter the outcome.
- Send a **thank-you gift** or handwritten note for any introduction.
- Consider a **referral rewards program** (check compliance with local rules).

8. Review & Adjust

Quarterly:

- Audit your touchpoints for consistency and effectiveness.
- Identify which clients haven't been engaged recently and re-engage.

Annually:

- Review the return on investment for each strategy.
- Survey clients post-anniversary or post-event to refine your approach.

Revision #1

Created 7 April 2025 00:33:13 by Eryn Richardson

Updated 7 April 2025 00:34:19 by Eryn Richardson