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.

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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.

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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.

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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).

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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.

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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.

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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.

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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.

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