

SURGE 30
SEASON 2

30 Minutes to Draw Your Business Blueprint

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Building a house business



Start with the plan

The beginning of your plan may have been the intention to change careers or simply obtaining your license and letting fate take its course.

Once your plan is in place, the next step is to lay the foundation.



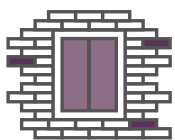
A solid foundation

Your **Sphere of Influence (SOI)** is the “foundation” of a strong and successful real estate business. This includes everyone you know, and everyone who knows you.

Identify the sources that comprise your SOI:

- ALL of your friends and family (even out of state)
- Neighbors
- Past coworkers (and current ones too, if you have another job)
- Social groups (book club, gym, poker, sports, etc.)
- Vendors (dry cleaner, dentist, insurance agent)

You'll have a core list of 100-200 contacts in no time—that is an excellent start to a solid foundation!



Continue adding bricks

Building your business is not necessarily about your SOI doing business with you (although we hope they will when the time comes). It's about the people who they know that you don't.

Every referral your SOI sends your way is another brick added to build a strong, lasting and successful business. Strengthen that foundation by:

- Utilizing a **Customer Relationship Manager (CRM)** database to track contact information and automate communications.
- Letting them know you are here to help them and their friends with all things real estate (see scripts starting on page 4).
- Reaching out to them **AT LEAST SEVEN TIMES**. It takes hearing something seven times before people will recall it. Until the seventh time, your SOI won't be conditioned to automatically connect your name with real estate.
- Continuing to add the people you meet to your CRM. They are now a part of your SOI and you'll need to stay in touch to build your business!

Create raving fans

As you build your SOI, you'll also want to make them raving fans of your real estate knowledge and services. Make sure you are the one they contact instead of going online to get their real estate questions answered. As a PenFed Realty agent, you have the following tools at your disposal:



Market Activity Reports

Market Activity Reports (MARs), available through Sage CRM in BHHS REsource Center, show homeowners how many potential buyers are looking for homes like theirs and provide updates on listings and sales in their neighborhood. This is a fantastic way to peak their interest and obtain listing appointments.



PenFed Realty Concierge

PenFed Realty Concierge (PFRC) is a fantastic new platform just released for the exclusive use of PenFed Realty clients. This system makes moving easy for your clients, and for you to share your list of preferred vendors that could help with all things house-related, e.g., plumbers, electricians, movers, etc. To find out more about PenFed Realty Concierge:

- Mid-Atlantic, Florida and Tennessee agents: go to www.pfrworksite.com
- Texas and Kansas agents: go to www.penfedrealtyconcierge.com



Social Media

Of course, social media is where it's at to easily reach many sectors of your SOI—and it's a great place to add value. Tune into Episode 2 of Surge30 with Karmela Lejarde to learn how to generate organic leads through social media, and Episode 4 with Tiffany Klusacek to learn how to effectively apply a “forever agent” mentality to engage with your Sphere on social media.

Keep it going



Having a plan to engage with your SOI on an ongoing basis is key. Actually taking the time to execute your plan is critical! Let's look at some important components of an effective, streamlined engagement plan.

Know your ABCs

Engaging with your SOI can be accomplished by a combination of email, text, social media, snail mail, calls and visits. But, how do you decide what to do and when to do it, without taking up all of your time? Try dividing your database into A, B and C contacts:

- The As are your contacts who support you the most by recommending you to potential clients often or on a regular basis.
- The Bs are those who recommend you if they are able to, and/or when they are asked.
- The Cs are those who are less likely to recommend you.

Dedicate the appropriate amount of time and methods of communication to each contact based on their A-B-C grouping.



Recalibrate your database annually

Building your SOI is a never-ending activity—it should be changing and growing constantly. As your business matures, you should recalibrate your database annually to ensure that you are engaging with the right people in the right way. Most importantly, you should be utilizing an efficient system, such as a CRM, to manage your SOI in a way that reminds you to stay in touch with all of those great people who know, trust and love you!

Building your business based on the solid foundation of your SOI and referrals is the absolute BEST way to build a business that will be more profitable and enjoyable, and create lasting relationships!

Appendix: Scripts



Sphere of Influence Script 1

Hi, _____, this is _____. How are you today?

_____, do you have a quick minute for me? The reason I'm calling is that I have entered the real estate business with Berkshire Hathaway HomeServices PenFed Realty. I'm excited about the company and the business, and I would really appreciate your help.

The next time you hear of someone who is thinking of making a move, would you do me a favor?

First, would you tell them about me? Second, would you pick up the telephone and tell me about them? I'd really appreciate it. I will send you some of my business cards in the mail tonight. Let me make sure I have your current information. (Verify address and email information.)

By the way, whom have you heard might be planning on buying or selling real estate?

Thank you again, good-bye.

Appendix: Scripts



Sphere of Influence Script 2

Good evening, _____, this is _____. How are you? I have a couple of minutes and wanted to give you a quick call. Is this a convenient time for us to talk?

_____, I need your help. As a real estate sales professional, I have a goal to help _____ families buy a home, sell their existing home or buy a second home and I was wondering, who have you heard of that needs my help in the near future?

I appreciate your taking the time to think about it. Can you think of anyone in your church group, family, neighborhood or work that may need my services at this time? (If yes, ask: Would you mind if I give them a call?)

By the way, when do you plan on moving?

_____, I've set very high goals for myself this year and I truly appreciate any help you can offer me in achieving them. So, would you mind if I check in with you periodically to see if there is anyone you know who is interesting in my services?

Thank you again, good-bye.

Appendix: Scripts



Open House Invitation

Mr. and Mrs. _____, my name is _____ from Berkshire Hathaway HomeServices PenFed Realty. As you know, we are marketing the home at _____ (give address).

As part of our marketing plan we are holding an Open House on _____ (date) from _____ to _____ (time).

We find that many homeowners are interested in keeping abreast of real estate activity in the area, so I would like to invite you to stop by.

By the way, who have you heard of that might be interested in moving to the neighborhood? Do you think I should invite them? What would be the best way to contact them?

It was nice speaking with you. I look forward to seeing you at the Open House.

By the way, would it be of value if I emailed you monthly updates on market activity in the area? (Obtain email address and set up prospect with a Market Activity Report.)

Appendix: Scripts



During the Open House

Welcome

Hello, my name is _____, and you are? May I ask, did you see our ad in the newspaper (online) or my open house signs? Would it be possible for me to get your comments on this house after your tour? The owners and I would really appreciate knowing your reactions.

Probe: Open-Ended Questions

What puts you in the market right now? When would you like to be in your new home? What do you like most about this area? What special requirements do your children have regarding the school's extracurricular activities?

Probe: Close-Ended Questions

Have you had an opportunity to talk to a mortgage lender about financing options? Do you have a property you need to sell prior to purchasing your new home? Are you working with a real estate sales professional to help you sell your property?

Close

I will be glad to research other properties for you. When would be the best time to get in touch with you?

I'm certain I can help you find the right property that fits your needs. I preview properties several times a week so I keep on top of the most recent listings as they come on the market. Let's get together and make a comprehensive list of all your wants and needs in order to find the very best home for you. I'm available at 6:00 tonight, or would Saturday morning work better for you?

I would like to provide you with a website account on my company's Berkshire Hathaway HomeServices PenFed Realty website so you can search the listings in the MLS, save searches and properties, and the other tools on our website. Would that be of value to you? All I need is the correct spelling of your first and last name, and your email address.

Appendix: Scripts



Target Marketing / Niche Script

Hello, _____. My name is _____, from Berkshire Hathaway HomeServices PenFed Realty.

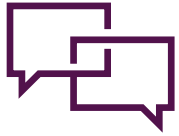
I was in the neighborhood and wanted to stop by to say hello and introduce myself and give you my card. I plan to specialize in this neighborhood so I can be of more help to sellers and buyers.

I would like to keep you informed about real estate information in the area with a monthly update report. Would that be of value to you? (Obtain first and last name and a valid email address and set up prospect with a Market Activity Report.)

By the way, who have you heard of in the neighborhood who may be thinking of selling? Do you have any friends or family that might be interested in moving into your neighborhood?

Thank you for your time; it was nice meeting you. Please don't hesitate to give me a call with any real estate questions or needs.

Appendix: Scripts



Just Listed Script 1

Hello, _____. My name is _____, from Berkshire Hathaway HomeServices PenFed Realty.

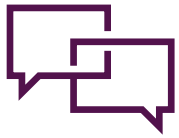
We have just listed your neighbor's home at _____ for sale. I just called (stopped by) to let you know that it was available and to ask if you have heard of anyone (friends, family, co-workers) who would like to live near you.

The reason I ask is that statistics show that very often the people who buy a property are friends or family of the current residents. So, this may be an opportunity to select your new neighbors.

By the way, are you thinking of selling your home?

Would it be of value if I emailed you monthly updates on market activity in the area? (Obtain first and last name and a valid email address and set up prospect with a Market Activity Report.)

Appendix: Scripts



Just Listed Script 2

Hello, _____. My name is _____, from Berkshire Hathaway HomeServices PenFed Realty.

We have just listed your neighbor's home at _____ for sale.

When we are hired to market a home, we tap every possible source to find the right buyer. We often find our buyers are friends or relatives of those who already live in the neighborhood. So, I am calling (stopping by) to let you know the home is available and to ask if have heard of, or know of, anyone who may be interested in purchasing a home in the area. Have you?

Are you considering relocating now or in the near future?

Would it be of value if I emailed you monthly updates on market activity in the area?

(Obtain first and last name and a valid email address and set up prospect with a Market Activity Report.)

Appendix: Scripts



For Sale by Owner Script

Hello, _____. My name is _____, from Berkshire Hathaway HomeServices PenFed Realty. (Hand your business card or brochure to the FSBO prospect.)

I was driving by and noticed your sign and I wanted to stop for a minute to introduce myself. I make it a point to be familiar with all the properties in my market area whether they are listed or not.

May I ask how long your home has been on the market? What is the current list price? How did you come up with the asking price? Why are you selling your property?

How are things going so far? Have you had any offers?

While I'm here, would it be alright with you if I briefly walked through your property, and you can point out all the features of the home that you consider selling points?

(While walking through the property ask follow-up questions.) How big of a hurry are you in to get your home sold? Is there a reason you decided to try and sell yourself whether than listing with a professional real estate agent? If I brought you a qualified buyer, would you be willing to pay me a commission of ____%?

If I could show you that you could sell your home through me and still net the same amount, and possibly more, would you be willing to list with me?

Please keep my card so whenever you have questions or want to discuss the marketing of your home, I'll be more than happy to help. I will be sure to stay in touch.

For Sale by Owner Follow Up

- Create a follow-up plan.
- If you are turned down and cannot preview the property, send a handwritten thank you note and some information on current financing, similar homes for sale or sold, or any information that shows your sincere interest in wanting to be of assistance. Be sure to include descriptive information about you and our company, and the services we offer.

Appendix: Scripts



Lead Follow-Up Script

Hello, _____. My name is _____, from Berkshire Hathaway HomeServices PenFed Realty.

Buyer

- I'm calling to follow-up with you on your home search.
- Are you still in the market to purchase a home?
- Have you seen any you liked?
- Would it be helpful if I ran an updated search for you?
- Have any of your parameters changed? (Price, location, timing, etc.)
- Are you available Saturday to look at homes or would Sunday afternoon be better?
- Who else do you know that may be considering a move?

Seller

I'm calling to follow-up with you and determine your readiness to place your home on the market.

- Are you still planning on selling your home?
- Ideally, when would you like to make the move?
- What needs to happen to move you closer to placing your home on the market?
- How can I help?
- Would it be of help if I ran a search of home in the area you are planning to move?
- Would it be helpful if I created a Comparative Market Analysis outlining what homes similar to ours are selling for in today's market?
- I can pop by at (time), or would (time) be better?
- Who else do you know that may be considering a move?

Appendix: Scripts



Just Sold Script

Hello again, _____. This is _____ from Berkshire Hathaway HomeServices PenFed Realty.

I just wanted to let you know that we recently sold the home at _____ (address). In marketing the property, we found several families who were interested in the neighborhood. I was wondering if you were considering selling your home now or in the near future.

Who have you heard of who might be thinking of buying or selling a home?

I would like to keep you informed about real estate information in the area with a monthly update report. Would that be of value to you? (Obtain first and last name and a valid email address and set up prospect with a Market Activity Report.)

Thank you for your time, and when you have any questions about real estate, please remember to contact me.

Appendix: Scripts



Expired Listing Script

Good afternoon, _____. My name is _____ with Berkshire Hathaway HomeServices PenFed Realty. I noticed that your property is no longer being offered for sale through the multiple listing service. Are you aware that your property is currently off the market?

Are you still interested in selling your property? Why do you think your property did not sell?

What do you think your previous real estate agent did well?

What are your expectations of the next sales professional you hire to market your property?

It always concerns me when a property fails to sell, and I know it must be frustrating for you. What I would like to do is to arrange a short visit with you to see the inside of your house and explore some possibilities why your house did not sell. I know I can provide some ideas and insights on how to get your house sold. Just about 20 minutes is all we will need.

Is later this afternoon good for you, or would this evening be better?

Objection

Expired Seller: Why didn't you show my home when it was on the market?

Agent: The reason I did not show your home when it was listed is because I focus on selling my own listings. Sellers who list with me appreciate that I give them my full attention.

OR

Agent: To be honest, the reason I did not show your home was because the buyers I worked with in your price range felt the home was priced above the market. They purchased other homes. I think a good first step for us would be to generate an updated in-depth evaluation of your home using comparable homes in the area.

This would include the sold properties, the actives and the ones like your home that failed to attract a qualified buyer.

Appendix: 6-Month Email Campaign

for Newer Agents

The following pages contain the language you can use to send a monthly email campaign to contacts in your SAGE CRM. One email is sent each month for six months.

As an option, consider using the email scripts to create a video so you're speaking directly to your audience.

Email #1 - Announcement

Dear <Recipient First Name>:

So much has happened to me recently; I just had to let you know the good news!

Recently I joined Berkshire Hathaway HomeServices PenFed Realty as a real estate sales professional. Though, I am fairly new to the real estate profession, what I lack in experience I make up for in enthusiasm and dedication. I pride myself on my ability to truly listen to my clients' needs and connect with them with opportunities that best match those needs. Additionally, I return phone calls and email promptly to ensure responsive and personal service.

Should you have a real estate need, I will work tirelessly for you to ensure you are connected with the best real estate opportunities.

I greatly value the personal relationship I have with you and hope that you will consider contacting me for any of your future real estate needs. My contact information is below.

Best wishes,

(Email Signature)



Appendix: 6-Mo. Email Campaign

for Newer Agents



Email #2 – Referral Request

Dear <Recipient First Name>:

I hope this email finds you in good health and spirits. I have just completed weeks of intensive real estate training, and am prepared to help all of my friends, family, neighbors and former co-workers with their real estate needs.

I need your help. I am looking to expand my business and work for great people, like you. Who have you heard of that might be in need of professional real estate services?

Thank you for supporting me and my business endeavors. I hope to hear from you soon.

Best wishes,

(Email Signature)

Appendix: 6-Month Email Campaign

for Newer Agents



Email #3 – CMA

Dear <Recipient First Name>:

I hope all is well with you. Things are going great for me. I am finding real estate both challenging and rewarding and am building my real estate business on a firm foundation of personal service, dedication and professionalism.

Whether you are in the market to purchase or sell a home, I have the resources and the expertise to provide you with the excellent service you deserve. If you would like a free no-obligation estimate of the value of your home, or if you would like information about interest rates, current market availability of properties or how to go about finding a home, please don't hesitate to contact me by phone or email.

By the way, who have you heard of who might be in need of professional and reliable real estate services?

I'd love to hear from you soon.

(Email Signature)

Appendix: 6-Month Email Campaign

for Newer Agents



Email #4 – Market Activity Report

Dear <Recipient First Name>:

Hello again. Many people enjoy receiving information on market activity in their area, such as: new listings, price and status changes to existing listings, etc. One of the professional services I provide is a Market Activity Report emailed to you weekly or monthly.

Please contact me by phone or email and let's get you set up to receive an informative Market Activity Report today!

By the way, I appreciate referrals. Who have you heard of who may be thinking of buying or selling real estate? Let me know how I can be of assistance. I'm happy to share my enthusiasm with others.

Best wishes,

(Email Signature)

Appendix: 6-Month Email Campaign

for Newer Agents



Email #5 – Update

I hope this email finds you happy and healthy.

It has been a number of months since I joined Berkshire Hathaway HomeServices PenFed Realty and I've spent that time in the field with other experienced real estate agents learning the business and the market. This on-the-job training has led to me becoming a trusted, professional real estate agent. No agent in town works as hard as I do.

I would love to be a valuable resource for you for any of your home needs, so please think of me when you have questions regarding an upgrade, renovation or a move. If you know anyone who needs my assistance now, I would really appreciate an introduction to them. I work very hard for all my clients.

Best wishes,

(Email Signature)

Appendix: 6-Month Email Campaign

for Newer Agents



Email #6 – Follow Up

Dear <Recipient First Name>

I hope you have enjoyed the emails I have sent during the past few months. As you know, I greatly value the personal relationship I have with you and thank you for supporting me in my efforts to grow my real estate business.

Should you, or someone you know, have a real estate need, I will work tirelessly to ensure the best possible service and outcome. My services include:

- Real estate sales
- Real estate purchases
- Local real estate market reports
- Local real estate market expertise and guidance
- Real estate professional referrals for people moving to another county or state

Please don't hesitate to contact me. I appreciate referrals to people you know who have a real estate need!

Best wishes,

(Email Signature)