

# REFERRAL PLAYBOOK

**7** STEPS FOR  
MORE REFERRALS

# INTRODUCTION

No referrals, no business.

This seven-part guide should serve as a resource that will ignite ideas and help you build a solid foundation of best practices and habits for generating leads from referrals. Simply put, developing a business based on referrals is not just important, but mandatory for a successful career in real estate. The agent who ignores the need to promote his or her business by referral may survive, but the reliability and quality of incoming leads will be severely compromised.

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## STEP 1

Are you sending mixed messages?

Completely remove yourself from your world and think from the outside-in, rather than the inside-out. What does your sphere of influence see, hear, think, and assume about you, your services, your brand, and your company? Take a deep look in the mirror and assess your current situation.

1. Do clients see someone who is **successful**?  YES  NO

Why did you answer yes or no?

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2. Do clients see someone who is **passionate**?  YES  NO

Why did you answer yes or no?

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3. Do clients see someone who **cares**?  YES  NO

Why did you answer yes or no?

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4. Do clients see a **winner**?  YES  NO

Why did you answer yes or no?

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5. Do clients see someone who is **organized**?  YES  NO

Why did you answer yes or no?

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6. Do clients see someone with **confidence**?  YES  NO

Why did you answer yes or no?

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If you answered “no” to any of the previous questions, here are a few solutions:



### Remove the word “busy” from your vocabulary.

There’s not a single good use for it. When you think “busy,” your brain stops taking on new challenges and opportunities. When you say “busy,” your sphere will stop referring business to you because they don’t want to make you busier. **By most accounts, the only person who wants you to be busy is you. We don’t want to cause anyone else to be busy, we want them to be happy, available, active, content, and excited.**

**Best practice:** From now on, replace the word “busy” with something else. When someone asks how business is going, say “exciting” or “great.”



## Be passionate.

When someone meets you, do they leave thinking, “Boy, hopefully he gets hit by a bus so his day gets better?” People want to do business with agents who love what they do. Make a conscious decision to be exuberant about what you have to offer.

**Best practice:** The top-producing agents possess a level of passion that is on a different scale than the average agent. They have the same skills, tools, advantages, and disadvantages as every other agent, but their passion is their biggest differentiator.



## STEP 2

### Ask thoughtfully. Ask often.

This is the hardest part of the equation. For most of us, it’s not part of our DNA to ask for help, and, in essence, that’s exactly what’s happening when you seek referrals. The funny thing is we love helping people. We often help people who don’t even want our help. Helping is comfortable, but asking for help can be uncomfortable.

So what do we do?



## Change your words. Don’t ask for help, offer it.

**Harder:** “Hey Steve, do you know anyone who might be thinking of buying or selling a home in the next year?”

**Easier:** “Hey Steve, I’d be really happy to help anyone you know that might be buying or selling a home this year. Do you know of anyone?”

**Scripts can feel awkward. Write a dialogue that feels natural to you:**

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## People don't need a car salesman, they need a car.

Instead of offering your professional services, consider having a conversation about your product, such as a home for sale or a buyer who needs a home. This makes the conversation more comfortable for you because it's less about you needing a new client and more about you helping people find what they need. Take a look at the examples below:

**Harder:** "Hey Sarah, I specialize in investment property. Do you know of anyone who needs an agent who specializes in that field?"

**Easier:** "Hey Sarah, I just saw a home come on the market that would make a great rental. If you know of anyone who wants investment property, this would be a great opportunity."

**Easier:** "Hey Sarah, I have a couple clients looking for rental properties to buy. If you know of anyone who is tired of being a landlord, let me know. Do you know anyone with rentals?"

**Write a dialogue that feels natural to you:** \_\_\_\_\_

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**Money Maker (at the end of every conversation):** "Oh, by the way, I just showed a great property for a first-time home buyer. If you know of anyone looking for their first home you'd be doing them a huge favor by letting them know about this deal. Have them give me a call."



## You don't have to specifically ask for referrals.

By helping people with no expectations of reciprocity, they will help you in return. This works especially well with other business owners when you can add value to their business.

**Easier:** "John, is there any way I can help you in your business or with something you're passionate about?"

**Write a dialogue that feels natural to you:** \_\_\_\_\_

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## Play to the ego.

We all know people who like to have their egos boosted. Don't be afraid to give the following verbiage a try:

**Easier:** "Michelle, you are so connected to all the right people and they all trust you. If I gave you some cards, would you give them out if someone you know has real estate needs?"

**Write a dialogue that feels natural to you:** \_\_\_\_\_

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## Help People to Help Others

Take yourself out of the equation. One powerful sales technique is to give people the opportunity to help someone else.

**For example:** "I've got a really nice family I'm trying to help get moved, and unfortunately, we just haven't found the right buyer for their home. So, if you happen to come across anyone who might be looking to move to the [West side of town], you'd be really helping them out."

**Write a dialogue that feels natural to you:** \_\_\_\_\_

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*"Hey Steve, I'd be really happy to help anyone you know that might be buying or selling a home this year. Do you know anyone?"*

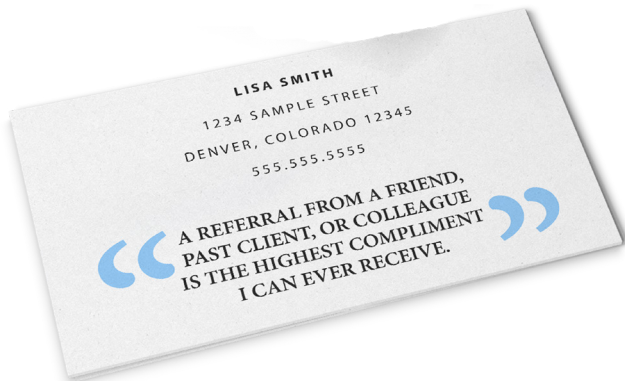


# 3

## STEP 3

### Make referrals a part of your brand.

Your mission should be to make sure everyone you know and come in contact with understands that you do business by referral. The steps to building this into your brand are simple and will pay off in big dividends over time. For example, all of your marketing materials should include a referral message. Take a look at the examples below:



- Business cards (see above example)
- Email signature
- Website
- Postcards
- Letterhead
- Newsletters
- License plate frame
- Name tag
- Bios on social media networks (and posts, when possible)

#### Example Taglines:

- “A referral from a friend, past client, or colleague is the highest compliment I can ever receive.”
- “I’m never too busy to accept a referral.”
- “I love referrals.”
- “Because I work by referral, I have more time for my customers.”
- “Because my business is built on referrals, please consider me the next time you talk to someone who needs a real estate professional.”
- “Please consider me the next time you know of someone who is moving.”
- “I treat every referral with the utmost care.”
- “Things I love in this world: family, friends, fun, and referrals. ”

#### What taglines can you think of for your personal brand?

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# 4

## STEP 4

### Choose your targets.

Find and care for your best referral sources. Some people will never refer you because it's just not in their DNA. However, some people are like bird dogs who go out and find buyers and sellers every day and are willing to refer you. Once you know who the best referrers are, really focus on taking care of them. You may already have an idea of who refers you and who doesn't, but consider the following activities to narrow it down even more.



#### Start a discussion.

Next time you're with some friends—maybe friends who you would expect to refer you, but haven't—simply ask them how they feel about giving out referrals in general. This is good dinner conversation, and you'll learn a lot about what scares them about referring. Later, you can turn the discussion toward helping them overcome some of those fears.



#### Figure out who's who.

Here is a great little trick for identifying the good referrers. Next time you need a product or service, ask for a referral on a social media site. Facebook typically works best because these are your friends, family, and clients, who are the target for referrals. Make sure it is an honest and genuine request.

**Audit your sphere:** Filter through your contacts, including your online social media contacts. Identify influential individuals, who seem to know everyone, and reach out to them to say hello or ask them to get coffee. Consider these personality profiles: chronic party-thrower, PTA President, Country Club President, Director of the HOA, most popular at your last job, most popular at your spouse's workplace, successful business people, etc.

**Who are your best referral sources?** \_\_\_\_\_

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# 5

## STEP 5

### Take advantage of social media.

As we've all come to realize, social media is a marketing opportunity and discipline worthy of its own workbook. We won't dive all the way, in but here are some things to consider.



Be active and maintain a consistent message which aligns with the principles of this workbook. This means you should have the same enthusiasm, passion, and can-do attitude that you would have when talking with someone in person.



Remind your contacts in a tactful and thoughtful way that you love getting referrals.



Lead with the product (e.g., homes for sale and buyers who need homes) rather than your services.



Update your contact information and bio to remind people you love referrals, and make yourself easily available.



Social proof is a great way to show referrals what you can do for them. Ask past clients to write reviews on your Facebook page, Yelp, Google reviews, and any other site you're listed on that accepts reviews.

**Try posting this status update:** “Anyone know of a good landscaper (or attorney, accountant, etc.)?” You’ll see the people who are passionate about referring come out of the woodwork. You can use this trick in person or over the phone, but going online gives you a larger sample. Now you can work on getting these people to be evangelists for you.

## How will you use social media to get referrals?

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### **Try changing your Facebook cover photo!**

A quick and easy way to show your sphere you love getting referrals is by updating your Facebook cover photo with a graphic that communicates that message.

# 6

## STEP 6

### Run with a wolf pack.

Establish a small group of professional contacts in industries that tie back to real estate, such as divorce attorneys, contractors, accountants, mortgage brokers, and bankers. Once you've assembled your Wolf Pack, let them know that you're looking for referrals, and that in turn, they can expect you to refer your clients to them. Make sure these professionals know that they're the only people in their respective fields that you will refer, and that you'll actively seek out new business for them.

- Identify these people or companies.
- You need to know these individuals on a personal level by spending time with them over lunch, coffee, or evening drinks.
- Let them know you are willing to really work hard to refer them.
- Ask them if they would be willing to do the same.
- Get to know their services well so that you'll have a good understanding when you're referring clients.

#### The people or companies I want in my Wolf Pack:

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## STEP 7

### Pay it forward.

When you receive a referral, do something thoughtful and genuine for the person it came from. This does not necessarily mean you have to spend a lot of money. Try a hand-written thank you card, a quick stop by their work or home, flowers, candy, a balloon animal. It can be anything as long as you put thought into it. Those bird dogs we talked about earlier want to be recognized, and if you can do it publicly that's even better.

Follow up with the people who often send you referrals. Let them know how things are going with the client they've sent. If it didn't work out, be honest and let them know why. Don't leave them wondering what happened.

**Finally, take care of your clients, or you can assume it will be your last referral!**

### What ways can you pay it forward?

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**Think outside of the box!**  
In 2017, Breakthrough Broker sent branded hot sauces, wishing clients a "hot" new year.