

The Do's and Don'ts of Maintaining Client Relationships

Stop fishing for business and start making meaningful relationships that last a lifetime.



A REAL ESTATE EBOOK FROM



Staying In Touch With Your Clients

The way we interact and communicate with one another has changed dramatically over the past 20 years. Social media, email, and smartphones have supplanted other archaic methods and, in turn, have created more opportunities and confusion than ever before.

This Do's and Don'ts guide should help clear the fog and aid you in identifying and properly taking advantage of this 21st-century landscape.



THE **Don'ts** OF MODERN-DAY CLIENT RELATIONSHIPS

Sustaining a relationship with your clients is just as important as executing on leads.

Here are some quick points describing what you shouldn't do:



1. Send a Generic, Insincere Email

Nothing says *I want your business* like an email with a blasé pre-designed template and a subject line that says "Hope You're Doing Well." In a society that loathes the skeezy spam emails and the fast-talking Jordan Belforts, sending out insincere emails isn't going to cut it. Instead, think about how else you can stand out while capitalizing on your personality as a real estate agent. You should also consider an email marketing software with customizable templates.

List of Email Marketing:

- Campaign Monitor
- Mailchimp
- Constant Contact

2. Consistently Resending Direct Mail to Current Clients

Fliers and sales brochures can be effective when generating new leads. However, your current clients don't need to be sold again. Direct mail is a numbers game, but you need to consider your current clients when sending these sales pieces. Otherwise, all you're doing is wasting their time and earth's resources.

THE **Don'ts** OF MODERN-DAY CLIENT RELATIONSHIPS



3. Only Contact Them When You Need Something

If you only call when you have a new listing you think they should see, they'll create a habit of ignoring your calls. It's good to keep in touch, but don't make it about business every single time. If you do need to have a sit down with a client, have it as part of a friendly social activity, like getting coffee or grabbing lunch.

4. Treat a Current Client as a One-And-Doner

When you treat every sale as a "let's get 'em and then let's get out," you aren't going to go very far in the real estate industry. Agents make their living by keeping in touch and developing relationships with their clients. Even if this client is almost certainly not going to purchase again anytime soon, having them as a potential referral or proponent through word of mouth will help generate business in the long run.

A close-up photograph of a pine branch with dark green needles and a small, reddish-brown pine cone. A dark semi-transparent rectangular box is centered over the image, containing white text. The text is a quote by Katherine Barchetti.

“

**Make a
customer,
not a sale.**

”

– KATHERINE BARCHETTI



THE **Do's** OF MODERN-DAY CLIENT RELATIONSHIPS

If there's one consistent variable that will give you the edge over your competition, it would be this: **sincerity**. People are not looking for a best buddy salesman. They want a purposeful relationship, one not predicated on transactions but on trust and personality. Here are some of our Do's for accomplishing this:

1. Remember Their Birthday With A Small Gift

Now, it's not like you haven't heard of this tactic before. However, instead of giving an evergreen present that all might enjoy, purchase something unique to them. This doesn't need to be a large expenditure. The thought behind the present will do the talking for you.

2. Connect On Social Media

Don't just Like the photo of their brand-new puppy; comment on it! Show your interest in their lives, and they will share the love whenever you make a post. This will increase your organic social reach, giving you free exposure to their friends and family.

THE **Do's** OF MODERN-DAY CLIENT RELATIONSHIPS



3. Meet In Person

Whether it's to get a quick afternoon coffee or play a tennis match, there's nothing more genuine than meeting in person to do something other than look at house listings. Investing time and energy in them will lead to a long-term relationship that could lead to them using you for their next home transaction.

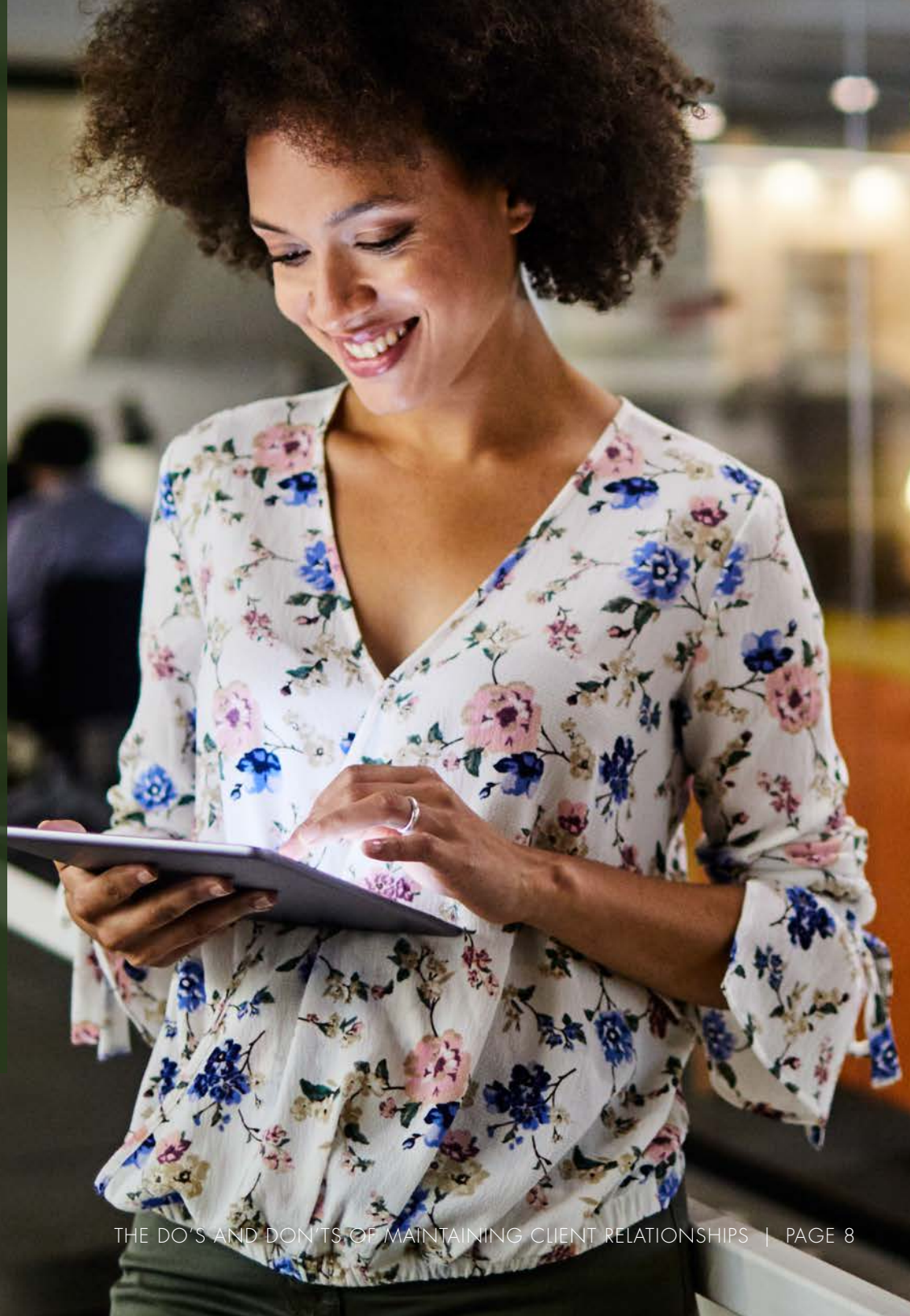
4. Keep Them Informed, But Do Not Sell

Even a soft sell can sound the kitchen alarms. People are more astute than ever at sensing when they're being pushed into a sale. Instead, be straightforward and inform them about a listing "you thought they might be interested in". Other subtle ways of informing clients is through a well-written newsletter where you discuss the real estate industry and other personal interests you may want to write about. Believe it or not, people love knowing their real estate agent is a die-hard NY Knicks fan.

Tools For Keeping In Touch With Your Clients

Organization is an essential practice for remembering birthdays, special events, and keeping track of personal information they share with you (e.g. remembering a client's daughter is getting married in the spring). The little details show you actually care. Here are a list of tools we highly recommend for organizing your client list:

- **Google Alerts** (free)
- **IXACT Contact** (\$29/month)
- **Salesforce** (price varies)
- **Hubspot** (price varies)



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**Saying hello doesn't
have an ROI. It's about
building relationships.**

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– GARY VAYNERCHUK

About Us

Founded in 2005, The CE Shop has become the leading provider of online real estate education through an encyclopedic knowledge of the real estate industry.

Our ever-expanding course catalog of Pre-Licensing, Exam Prep, Post-Licensing, and Continuing Education products are trusted throughout the industry and offer agents across the country the education they rely on.

With courses available in all 50 states and D.C., we're driven by a desire to constantly improve, both for ourselves and our students.

