Breakthrough 120

Part Two: Toolkit

kw Where Entrepreneurs Thrive®

Toolkit
Version 1.0

Telemarketing

WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance and visit https://console.command.kw.com/connect/learning/topics/10471 for more information.

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These materials may contain hypothetical examples and exercises meant to illustrate aspects of KW's financial, growth and investment models, including:

- calculation of profit share contributions and distributions;
- calculation of agent compensation;
- evaluation of a Market Center's financial results;
- agent productivity strategies; and
- estimates of return on investment.

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Likewise, offers of cooperative compensation are fully negotiable and not required by law or practice. Offers of cooperative compensation must be openly discussed with your client and authorized in writing before they are made or accepted. KW plays no role in agent decisions to offer or accept cooperative compensation and imposes no requirements on agents to offer or accept cooperative compensation.

Fair Housing

Warning! Buyer letters, videos and photographs may lead to Fair Housing violations. It is important to educate consumers about Fair Housing laws and talk with your broker before submitting buyer letters.

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CAN-SPAM Disclaimer

WARNING! When sending commercial email messages to U.S. recipients, you must comply with the CAN-SPAM Act of 2003 (CAN-SPAM), which requires the email message to provide the recipient with the ability to unsubscribe/opt-out of receiving future commercial emails. Contact your attorney to ensure your compliance.

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Updated 03/2026

TCPA/Do Not Call Compliance Pointers

1. **Know the Law**

- The Telephone Consumer Protection Act (TCPA) regulates calls and text messages and includes the National Do Not Call (DNC) Registry.
- Several states have their own telemarketing laws. You must follow these laws too.
- For information about the TCPA and DNC laws, visit https://console.command.kw.com/connect/learning/topics/10471
- Consult your market center or a lawyer for help with your telemarketing compliance.

2. **Get Proper Consent**

- Obtain proper consent from all consumers you call or text.
- You need prior express written consent to make telemarketing calls and texts using (1) an artificial voice, (2) a prerecorded message, or (3) an automatic telephone dialing system (which may include a dialer).
- You need prior express written consent to make telemarketing calls and texts to numbers on the National DNC Registry.

3. **Document Consent**

- Keep a record of consent from consumers and when you obtained it.

4. **Subscribe to the National DNC Registry**

- The National DNC Registry is hosted on a dedicated website (https://telemarketing.donotcall.gov/).
- Your market center should subscribe to the Registry and applicable state DNC lists and give you login credentials and/or you should subscribe and obtain your own login credentials.

5. **Maintain an Internal DNC List**

- Consumers have a right to request that you not call or text them.
- Consumers can revoke consent at any time in any reasonable way.
- Keep a record of Do Not Call requests you receive for 5 years.

6. **Check DNC Lists Before You Call or Text**

- Before making a call or text, check to see if the number is on: (1) the National DNC Registry; (2) a state DNC list; or (3) your internal DNC list or your market center's.
- Do not rely on lead lists from 3rd parties to be DNC compliant. It is your responsibility.

7. **Honor Do Not Call Requests**

- Don't call a number on the National DNC Registry or a state DNC list unless you have proper consent.
- Don't call someone who has asked to be on your internal DNC list.

8. **Honor Calling Time Restrictions**

- Never make a telemarketing call or text before 8 a.m. or after 9 p.m. local time at the consumer's location.
- Follow any additional state law restrictions regarding when you're allowed to contact consumers located in that state.

9. **Train Your Assistants, Including Virtual Assistants**

- You are responsible if your assistants do not comply with telemarketing laws. REV. 07/11/25

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Seven Compliance Tips for AI Use in Real Estate

1. The TCPA prohibits AI-voice calls unless you have received prior express written consent from the call recipient. You must follow the TCPA and other applicable federal, state, and local laws if you want to leverage AI for use with calls and texts. Contact your attorney to ensure your compliance with applicable law.
2. Use your images compliantly—including those you upload into an AI tool and AI generated ones! Don't upload images into an AI tool unless you have the copyright owner's permission to do so. Additionally, AI companies' terms and conditions may require you to disclose if an image or person is generated by AI or altered with AI (like virtual staging), so be sure to do so if required.
3. Do not use AI to create content you wish to protect with copyright: Under current U.S. law, only human-authored works can be copyrighted, so AI-generated content is generally not protected.
4. Protect client confidentiality: Obtain informed consent before uploading client personal data or any other confidential or sensitive information into AI tools, anonymize or de-identify information if possible, and review AI providers' terms and conditions and privacy policies.
5. AI can be unreliable. You can use AI to help create content, but it's important that all the content is checked for accuracy before publishing to avoid making misleading or deceptive statements.
6. Follow all applicable advertising laws. Even if you use AI, you still need to ensure that you're following all applicable advertising rules, like including your broker's name, DBA, license, etc.
7. Keep it ethical. Avoid misrepresenting the property and your clients with AI-generated content that isn't checked. You should thoroughly review all AI-generated output and confirm that such output is factually accurate, suitable for its intended use, and complies with all applicable laws and regulations as they pertain to your intended use.

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Resources

Resource	Description	Location
KW® Answers	Your one-stop for all KW® tech questions. Master Command®, Canva, Connect, and more. Get detailed step-by-step articles and videos for everything KW Tech.	answers.kw.com
Command®	Your CRM, design studio, and more. Be sure to access both the desktop and app.	console.command.kw.com
KW® Connect	Keller Williams® exclusive hub for learning and inspiration, brining events, training, and on-demand education together to keep you moving forward.	Access through your Command account.
MREA Podcast	The #1 podcast for real estate agents, The Millionaire Real Estate Agent unlocks proven systems driving big profits and big lives in real estate and beyond. Hear the plays from the top players themselves.	mreanotes.com
The ONE Thing Podcast	Achieve extraordinary results by focusing on the single, most important priority in all areas of your life.	the1thing.com/podcast
Keller Williams'® Social Media	The Keller Williams® community is focused on offering expert insights on all facets of real estate.	YouTube: youtube.com/@kellerwilliams Twitter: twitter.com/#!/kwri Facebook: facebook.com/KellerWilliamsRealty Instagram: instagram.com/kellerwilliamsrealty LinkedIn: linkedin.com/company/keller-williams-realty-llc

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Market Expert

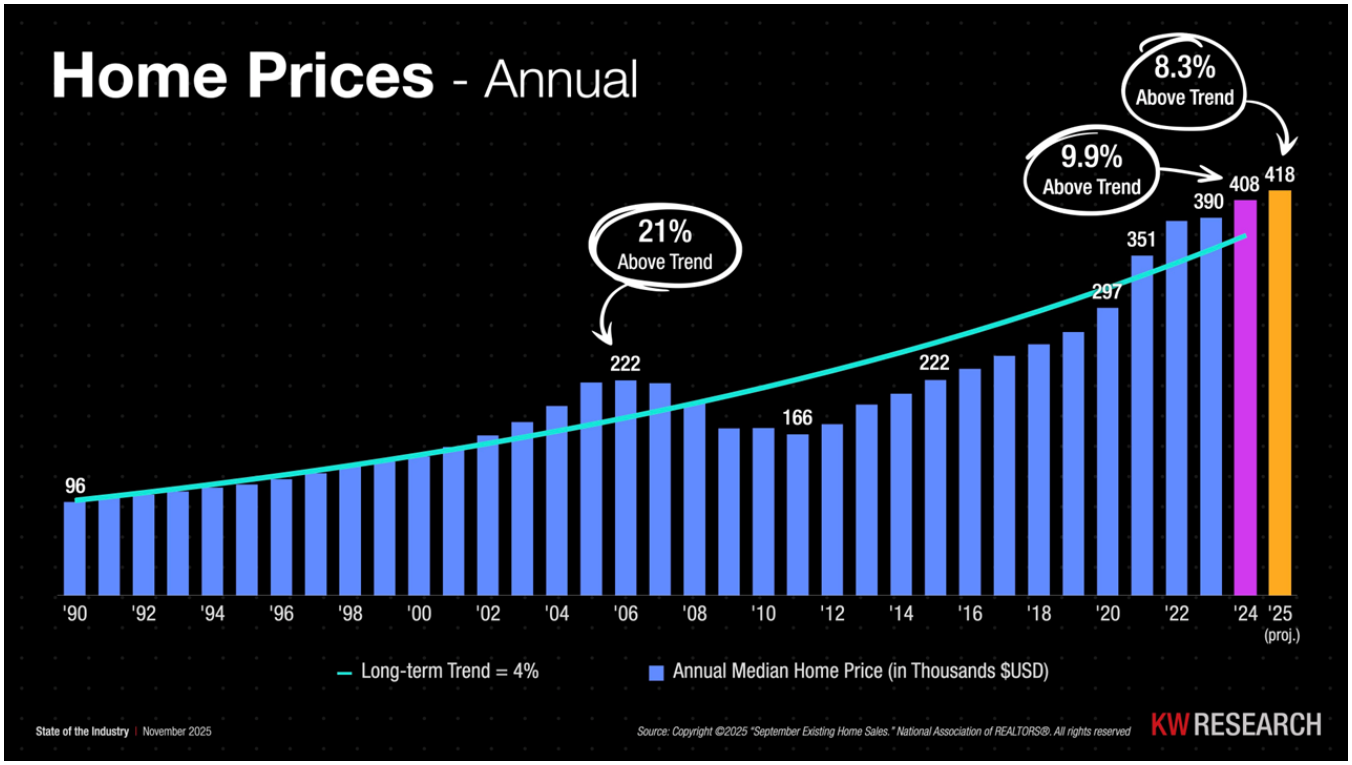
Agents need to know how to talk about real estate, from mortgage rates to school districts. Below are a few topics to become familiar with.

Beyond understanding the numbers or definitions, an agent needs to know how to talk about these things with buyers and sellers in a way that shows what those numbers or ideas mean to their sale and position in the market.

You can look to your local association or your brokerage to see numbers specific to your market, and some of the numbers provided here are updated bi-yearly at Mega Camp and Family Reunion, Keller Williams' two largest training events each year.

Home Appreciation

Historically, single-family homes appreciate at around 4% per year over time. That doesn't mean that from one year to the next a home will go up by 4%, but over time owning a home brings the homeowner equity. Own long enough and a home appreciates in value.



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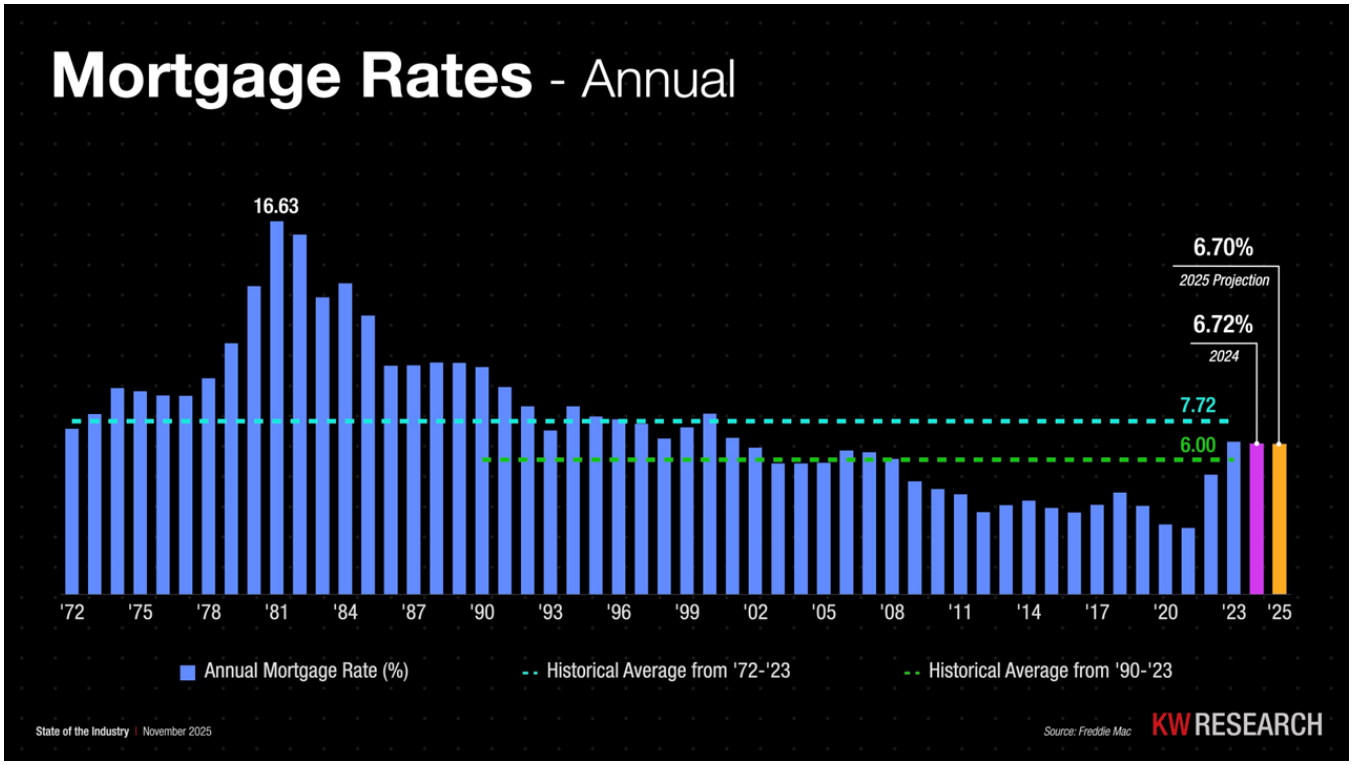
Market Expert (cont.)

Mortgage Rates

Mortgage rates go up and down depending on many factors and may significantly change affordability in a given moment. In general, **rising rates** reduce buyer purchasing power and cool demand; **falling rates** increase affordability and heat up the market.

Whether paying a mortgage or rent, one must have a place to live. Since housing prices historically appreciate over time, even seemingly higher interest rates can still mean that buying is a better option.

Rates rose significantly in 2022 following historic lows in 2020 and 2021. This made it feel as if they were too high at 6 to 7% in 2023-2025, but that was a feeling, not a historic fact. The average interest rate over the last 50+ years is 7.72% and the average over the last 25 or so years is 6%. Therefore, rates in the 6 to 7% range are at historic norms.



Market Numbers

Local market numbers matter more than national numbers. In addition to mortgage rates, every agent should be tracking the following market numbers so they can see the trends as they are happening and advise their clients accordingly:

1. **Inventory:** This is the industry standard for understanding how homes flow on and off the market. It is the number of properties for sale within a market and how long it would take for all those homes to sell at the current sales pace. Inventory is expressed in terms of the

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Market Expert (cont.)

number of months it would take to sell the current number of houses on the market.

1.1 Inventory = # of homes for sale/ # of homes sold per month.

1.2 Example: If one hundred homes are on the market and 10 are selling per month, divide 100 by 10 to get 10. It would take 10 months for all 100 homes to sell, which means there is 10 months of inventory in the market.

2. **Absorption Rate:** This is the percentage of homes being taken off the market each month. You can calculate the absorption rate by dividing the number of homes sold in a month by the total number of homes for sale at the start of that month.

2.1 Absorption rate = # of homes sold/ total # of homes available x 100.

2.2 Example: If there are 100 homes on the market and 20 of them sell in one month, divide 20 by 100 and then multiply by 100. The absorption rate is 20%.

3. **Type of Market:** In real estate, market types are defined by the balance between supply (the number of homes for sale) and demand (the number of people looking to buy).

3.1 Buyers' Market: More than seven months of inventory.

3.2 Sellers' Market: Less than five months of inventory.

3.3 Balanced Market: From five to seven months of inventory.

- Balanced markets often do not last long and may be a transitional period between buyers' and sellers' markets.

4. **Average Days on Market:** The average time homes are actively in the MLS prior to going under contract.

4.1 The lower the DOM the more urgency buyers may feel to see it.

4.2 A house with an above-average DOM, has less urgency and buyers will feel more comfortable negotiating a lower price.

4.3 In a sellers' market we see lower DOM and in a buyers' market we see higher DOM.

5. **Average Showings Per Listing:** The average number of showings scheduled through the MLS's chosen showing system prior to a house going under contract. (This metric does not account for showings made outside of that integrated system.)

6. **Average/Median Sales Price:** These two metrics measure the "middle" of the market in different ways.

6.1 The average sales price is the sum of all home prices divided by the total number of sales. It reflects the overall math of the market but can be skewed by a few extremely high or extremely low-priced homes.

- At a national level, we most often see the average price skewed higher by high-priced luxury sales.

6.2 The median sales price is the exact "middle" point of the market where 50% of homes sold for more and 50% of homes sold for less.

- The median is generally considered the more accurate reflection of what a "typical" buyer is experiencing when looking over large numbers of varied sales.

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Market Expert (cont.)

7. **Listing Price to Sales Price Ratio:** This is what homes are selling for as a percentage of their list price.
    7.1 In a strong sellers' market you'll likely see sales prices from 99% to above 100% of the list price.
    7.2 A buyers' market could lead to ratios much lower.
    7.3 For example, if the average list price is $300,000 and the average sales price is $290,000. Then the listing price to sales price ratio is 96.67%. Homes are selling for 96.67% of what they were listing for.

Market numbers are important at different scales. You'll want numbers for your city or market area for general conversation. You will want data for specific neighborhoods when you have listing appointments, open houses, or if it's a neighborhood you want to focus your business on.

In the end, these numbers answer questions like:

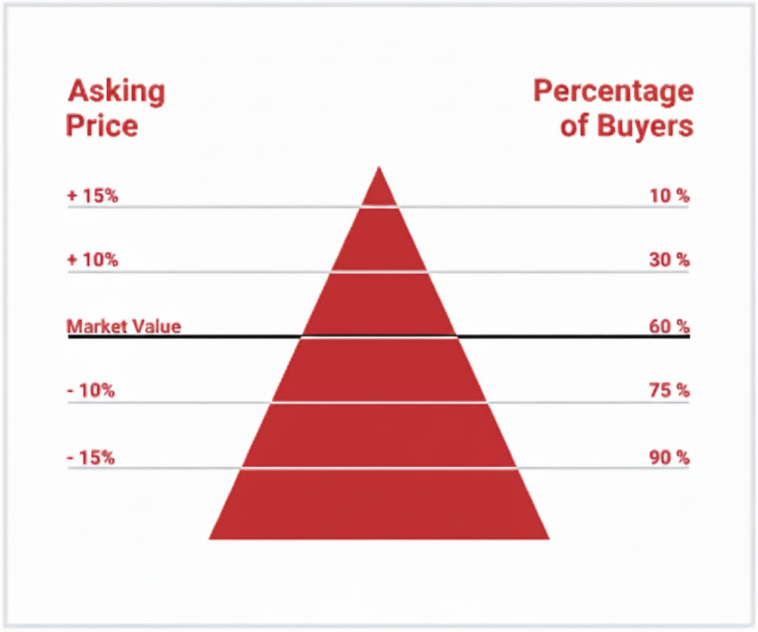
1. What are we likely to negotiate off the list price?
2. How long will a home take to sell?
3. Am I getting enough showings on my listing to show the market is interested at this price and with this marketing?
4. How much competition is there for homes in this area and price point?

Keep in mind that highly desirable neighborhoods or those with some additional downsides may differ significantly from the overall market.

Your local Multiple Listing Service (MLS), Brokerage Reports, and local association are the primary sources for this local data.

Pricing and Timing

Pricing a home correctly can help it to sell in any market, while pricing too high can leave a home sitting even in a sellers' market. Understandably, both the seller and listing agent want to price a home as high as possible while still getting it to sell. The dangers of overpricing a home outweigh those of underpricing. An under-priced home has the opportunity to attract multiple buyers who can push the price up. An overpriced home simply sits on the market without much activity.



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Market Expert (cont.)

Some truths of pricing are:

1. Fair market value attracts buyers; overpricing never does.
2. The first two weeks of marketing are crucial.
3. The market never lies, but it can change its mind.

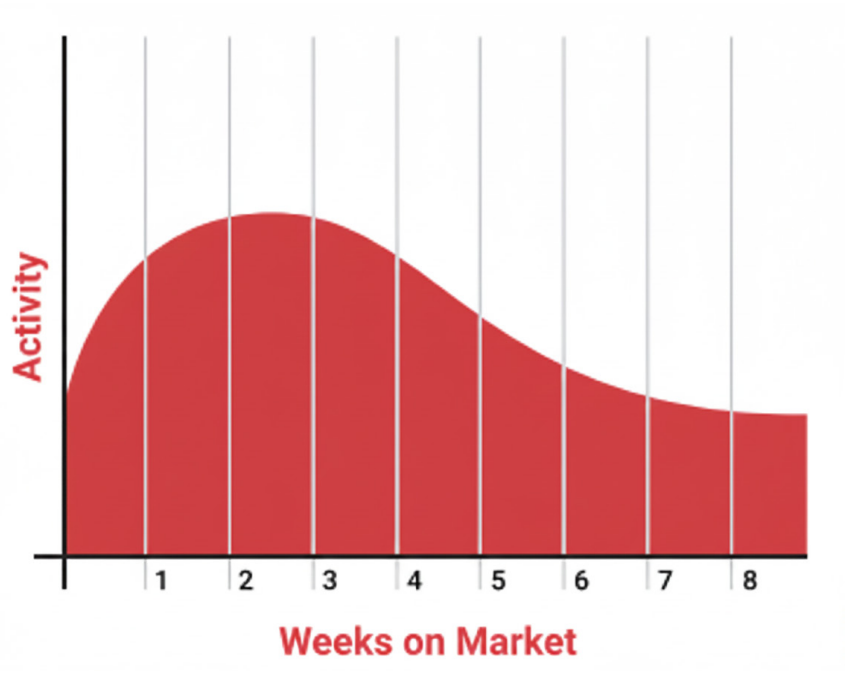
Fair market value is what a willing buyer and seller agree by contract is a fair price. The two biggest factors in value are location and condition.

Sellers often view their homes as special and unique, which they assign a higher value to than the market does. They believe they can always come down, but that is a mistake. Overpricing keeps buyers from ever seeing a home. Most buyers shop by price range and look for the best value in that range.

Price even moderately above the market, and you can miss up to 50% of the buyers that would have come to see it if it were priced accurately. Price moderately below the market, and you can gain the attention of up to 40% more buyers.

The best chance of selling a home comes in the first two weeks it is on the market. When it's fresh and exciting to buyers, more buyers want to see it, and they feel an urgency to see it. If there are not many showings or offers in the first two weeks, it's likely that a home is overpriced and not comparing well to its competition.

Though the market may shift in ways that give an overpriced or un-spruced home a second chance, the only way to be sure you bring the most interest is to be priced at or below the market and create the best possible condition.



Seasonality

Home sales peak and fall depending on the time of year. Sales typically start to go up in the spring, peak in the summer, and bottom out in January and February. The typical seasonality of home sales follows the school year. However, that doesn't mean that every market follows this pattern. Second home markets often do not follow this pattern and other local aspects will also affect seasonality.

Understand the seasonal cycle in your local market. Do prices peak in summer and slow in winter? Is Spring the best market? Knowing this allows you to set proper client expectations for timing a sale or purchase.

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Market Expert (cont.)

Hyper-Local Expertise

Being the market expert is key to providing value to clients.

1. **School Districts:** The single most important factor for many family buyers. Know boundaries, rankings, and what high school a neighborhood feeds into. Have reputable resources ready to share with buyers.
2. **Zoning Laws:** What is a permissible use for a property? Are there areas with specific regulations (e.g., short-term rentals, historic district rules)?
3. **Taxes and Fees:** Understand local property tax rates, special tax districts, and typical HOA and condo fees in different areas.
4. **Commute and Transit:** Know the typical rush hour traffic patterns and the location of major public transit hubs. “How long does it take to get downtown at 8:00 AM?” is a common question.
5. **Amenities:** Be the local concierge. Know the best parks, local coffee shops, popular restaurants, grocery options, and community centers.
6. **Builder/Housing Stock:** Understand the main architectural styles, dominant builders, and typical home sizes/ages in your target areas. Is it a market of 1950s ranches or new construction town homes?
7. **Common Issues:** Know what physical property issues are common in your area (e.g., specific foundation types, flood zones, old piping, or termite issues).

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Market Expert (cont.)

Buyer Agent Compensation by Sellers

It's important that sellers understand all their options when it comes to agent compensation. All commissions are negotiable, and whether or not a seller wants to compensate a buyer agent is their choice. There are pros and cons to a seller deciding to pay a buyer agent. In discussing a seller's options, do not suggest that the seller must offer buyer agent compensation. Also, do not suggest that other agents may not share the listing for the seller's house if buyer agent compensation is not offered or a certain amount is not offered, and do not suggest that the house will not sell if buyer agent compensation is not offered.

According to the 2025 Profile of Home Buyers and Sellers published by the National Association of REALTORS®, 92% of buyers of previously-owned homes (meaning the home your client is selling) relied on an agent or broker to help them make that purchase.

Given this number, the likelihood of finding an unrepresented buyer is low. And a buyer must pay their agent. If a seller does not want to negotiate buyer agent compensation, some buyers would be challenged to pay their buyer agent out of pocket along with other closing costs and therefore may not make an offer. Accordingly, a seller may want to be open to negotiating buyer agent compensation to attract the largest pool of buyers.

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Likewise, offers of cooperative compensation are fully negotiable and not required by law or practice. Offers of cooperative compensation must be openly discussed with your client and authorized in writing before they are made or accepted. KW plays no role in agent decisions to offer or accept cooperative compensation and imposes no requirements on agents to offer or accept cooperative compensation.

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Conversation Frameworks

Below are conversation models for lead generation via your database, open houses, and social media. These conversation frameworks are starting points for you to make your own.

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Database Dialogues

Database 1: FORD Model Dialogue

FORD is a conversation framework that stands for family, occupation, recreation, and dreams. FORD helps you to learn more about your SOI by asking questions that genuinely interest you both. They also often reveal information about upcoming real estate needs.

Family

How's your family doing? I heard you just had a new baby!

Occupation

Are you still working at ABC Company? How are you enjoying that? Any changes in the works?

Recreation

What new restaurants have you tried around town lately? How were they?

Dreams

Where are you in your plan to retire to the mountains one day?

Database 2: Exciting New Chapter Dialogue

Hello [name] , this is [your name]! Do you have a moment? How have you been?

Exchange pleasantries.

I wanted to share something exciting. I've officially started a new chapter as a real estate agent! I'm really passionate about helping people navigate big decisions like buying or selling a home. You've always been someone I value, so I just wanted you to hear it from me directly. If you or someone you know ever needs anything real estate-related, I'd love to be your go-to resource.

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What are your real estate plans for the next year?

They will answer in one of three ways:

1. They don't plan to buy, sell, or invest in real estate in the next 12 months. If they say this, note it in your spreadsheet.
2. They do plan to buy, sell, or invest in the next year. If they say this, have a deeper conversation about what they plan to do and agree on a follow-up plan. These are the hidden opportunities!
3. They tell you that they just bought, sold, or invested without you. If they say this, congratulate them and tell them that you hope to be able to be of service to them in the future.

If they don't answer, leave a live voicemail and send a text.

Hello [name]. This is [your name]. I hope you're doing great. Give me a call back when you get a chance!

Database 3: New to Keller Williams Dialogue

Hello [name], this is [your name]! Do you have a moment? How have you been?

Exchange pleasantries.

I'd like to share some exciting news. I've started my real estate business at [Market Center name]. As you know, I'll do whatever it takes to help people. May I count on you to help me grow my business? I'd like to share my free real estate app with you. It's so easy to check what's for sale and for what price on your street, in your neighborhood, or any place in the US and Canada. I can send you a text with a link, does that sound good?

I'd also like to offer a real estate update on your neighborhood. All I need is your current address and email and you'll start receiving it right away. You can also add additional neighborhoods you are interested in. Is there another neighborhood you would like to know about? Do you mind sharing this information with me? Thanks!

I am building my business with people I know and the people they know. Do you know of anyone from work, your neighborhood, or a group you belong to who's thinking of buying or selling a home, or investing in real estate? I'd be pleased to be a resource for them.

If referral given:

Would you mind sharing their name and contact information so I can connect?

Thank you for your time and help, and please let me know if there is anything I can ever do for you. Let me know how you like my search app and the neighborhood updates.

If no referral given:

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If you do hear of someone with a real estate need, will you keep me in mind? Great. Let me know how you like my search app and the neighborhood updates.

Database 4: Reconnection Dialogue

Hello [name], this is [your name]! Do you have a moment? It's been awhile and I'd like to apologize for not staying in touch. How have you been?

Exchange pleasantries.

I've been busy growing my real estate business with (Market Center Name) and working with great clients like you. I wanted to share that I have a personal goal to help (#) of families get into the home of their dreams this year. As you already know, I'll do whatever it takes to help people.

May I count on you to help me reach my goal?

I'd like to share my free real estate app with you. It's so easy to check what's for sale and for what price on your street, in your neighborhood, or any place in the US and Canada. I can send you a text with a link, does that sound good?

I'd also like to offer a real estate update on your neighborhood. All I need is your current address and email and you'll start receiving it right away. You can also add additional neighborhoods you are interested in. Is there another neighborhood you would like to know about? Do you mind sharing this information with me? Thanks!

If referral given:

Would you mind sharing their name and phone number or email so I can contact them?

Thank you for your time and help, and please let me know if there is anything I can ever do for you. Let me know how you like my search app and the neighborhood updates.

If no referral given:

If you do hear of someone with a real estate need, will you please keep me in mind? Great. Let me know how you like my search app and the neighborhood updates.

Database 5: Connect with Your Network Dialogue

Exchange pleasantries. Start the conversation with something relevant about your connection with them. For example, if you are reaching out to your hairstylist, you can tell them that you're getting a lot of compliments on your last haircut.

I want to share some exciting news with you. I'm reaching out to tell you that I am now a real estate agent with (Market Center Name).

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I want to be a helpful resource for you, whether that's providing market information, answering real estate questions, or connecting you to great local service providers.

Would it be okay if I added you to my contacts and kept in touch with occasional updates or helpful tips?

Awesome! Just in case, do you or anyone you know have any real estate goals this year that I could help with?

If they say yes, set a follow-up.

Great! What's the best email or phone number to keep in touch?

If no, thank them and reinforce staying in touch.

If the person you spoke with granted you permission, add them to your database spreadsheet and fill out as much information as you can about them.

If they don't answer, leave a live voicemail and send a text.

Hello [name]. This is [your name]. I hope you're doing great. Give me a call back when you get a chance!

Database 6: Calling Around a Neighborhood or Farm After a Recent Sale Dialogue

Hello [name], this is [your name] with [Market Center name]. Is this [homeowner's name]? I'm calling you because a home just sold in your neighborhood, and I wanted to share the news with you. I always keep residents informed about what's happening in the area. Can I share it with you quickly?

The home at (address or general area) recently sold for (sales price). This sale could impact the value of your property and the overall market trends in your neighborhood.

Sample questions:

1. Have you noticed any changes in the neighborhood's real estate activity?
2. Are you curious about how this sale might affect your home's value?
3. Would you like a complimentary, no-obligation market analysis of your property?

I offer free, detailed home value reports to local homeowners. Even if you're not thinking of selling, it's helpful to know where you stand in today's market. May I prepare one and send it to you? What's your best email address?

If yes, collect email address and continue below.

If no, continue below.

If you ever have questions about real estate—buying,selling, or just curious—

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please feel free to reach out. Thank you for your time and have a wonderful day!

Database 7: Direct Approach for Neighborhood/Farm After a Recent Sale Dialogue

Hello [name], this is [your name] with [Market Center name]. I wanted to let you know that a home just sold in your neighborhood at [address or area]. It sold for [sale price], which could affect your property's value.

There are almost always additional buyers when a home like this [sells so quickly, or other appropriate info].

Would you like a quick, free estimate of what your home is worth in today's market? If so, I can send you a report or set up a follow-up call or meeting.

Let me know if you're interested. Thanks for your time.

Database 8: Follow-Up Dialogue

Hello [name]. You came to mind and I wanted to check in. As we move through this year, I wanted to see if you have any plans or thoughts about buying or selling a home this year.

Whether you're just curious about the current market, considering a move, or have questions about your home's value, I'm here to help. Even if you're not planning anything soon, I'd be happy to provide an updated market analysis or simply keep you informed about trends in your neighborhood.

Sample questions:

1. Are you thinking about making a move this year?
2. Would you like to know your home's current value or learn more about what's happening in the market?
3. Is there anything else I can assist you with regarding real estate?

Please let me know if you have any questions or if there's anything I can do for you. I'm always happy to help and am just a call or text away.

Database 9: Gratitude Dialogue

Hello [name]. This is [your name] with [Market Center name] and I'm calling today to tell you how much I appreciate you for [specific reason].

We were talking about gratitude today and you popped into my mind! I knew this was a good time to thank you and ask if there's anything I can do for you. Please don't hesitate to ask for help or advice or information.

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I also would like to remind you that my business is built on referrals from people like you who may be in need of my services to buy a home, sell a home, or invest in real estate in the next few weeks. Do you know of someone and would you give me their name?

Thanks for taking a moment to think about helping me. I appreciate you!

Database 10: Approach to Potential Sellers Dialogue

You might be wondering if now is a good time to sell your home. Here's why it could be for you:

- Strong Buyer Demand: There are still plenty of motivated buyers looking for homes, especially with more inventory to choose from. Buyers are excited right now.
- Serious Offers: Buyers today are more serious and prepared, which means smoother transactions and fewer surprises.
- Stable Prices; Home values remain strong, and selling now lets you take advantage of current price levels before any market shifts.
- Favorable Timing: With homes staying on the market a bit longer, you have time to plan your next move without feeling rushed.
- Equity Gains: If you've owned your home for a while, you're likely sitting on significant equity that you can use for your next chapter.

Does it make sense to take a look at this and talk further with no obligation? If you're considering selling, this is a great window of opportunity. Let's discuss how we can get you the best results!

Database 11: Referral Request Dialogue

Hello [name], it's [your name]! How have you been?

Let them respond and engage naturally. Then transition.

I just wanted to check in—no big agenda, just staying in touch. Real estate's been keeping me busy, and I always like to keep everyone in the loop.

Optional, depending on your relationship or timing.

I've been seeing a lot of movement in ***[neighborhood]*** and it made me think of you.

Add value.

If you ever need anything—contractors, market info, help for a friend—please don't hesitate to reach out. I'm always happy to be a resource, real estate or not.

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Ask for referral.

Do you happen to know anyone who could use some real estate guidance? Anyone thinking of buying, selling, or investing?

If yes:

That's great to hear! Would you mind sharing a bit about what they are looking for, or would it be OK for me to reach out to them directly?

If yes, alternative:

That's great to hear! Would you mind introducing us? I'd love to be able to help them.

If no:

If anyone comes to mind, please reach out. I'd love to help anyone you know and like! I really appreciate you thinking of me.

Wrap up.

That's it for me—just wanted to say hi and let you know I'm here if you need anything. Let's catch up soon!

If they don't answer, leave a live voicemail and send a text.

Hello [name]. This is [your name]. I hope you're doing great. Give me a call back when you get a chance!

Database 12: Referrals From Business Partnerships Dialogue

Hi [business owner], I'm [your name] with [Market Center name]. I'm in the process of creating a list of preferred businesses and service providers to give to my clients. Since I frequently have clients ask me for a good (dentist, landscaper, or other business), I only want trusted companies to refer them to. Since I have had excellent service from you, would you and your business be interested in being included?

If yes, continue:

Great! I like to establish these professional referral partnerships to help grow each other's businesses as well. So if I were to refer clients to you, would you be willing to refer your clients that are looking to buy or sell a home to me with the assurance that I will provide them with the high level of customer service that you expect?

If yes, continue:

Excellent! How about we confirm each other's contact information so that we can

get started?

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Database 13: Creating Referral Partnerships With Business Owners You Have Not Done Business With Dialogue

Hi [business owner], I'm [your name] with [Market Center name]. I'm in the process of creating a list of preferred businesses and service providers to give to my clients. Since I frequently have clients ask me for a good (dentist, landscaper, or other business), I'm looking for a trusted company to refer them to. I've heard good things about your company. Would you and your business be interested in being included?

If yes, continue:

Great! I like to establish these professional referral partnerships to help grow each other's businesses as well. So if I were to refer clients to you, would you be willing to refer your clients that are looking to buy or sell a home to me with the assurance that I will provide them with the high level of customer service that you expect?

If yes, continue:

Excellent! How about we confirm each other's contact information so that we can get started?

Database 14: Neighborhood Nurture Dialogue

Exchange pleasantries and use the FORD framework to get into a meaningful conversation. At a logical point in the conversation, mention that you're in real estate and have a great tool you'd like to give them access to.

Would you like to know what's selling in your neighborhood just to keep an eye on the area? How about I add you to a monthly email I call the Neighborhood Nurture? It will let you know what's come up and sold in your area over the last month in one simple email.

If yes, if you have their address, confirm it.

If you don't have their address, ask for it.

I just need your address so I can send you the correct information.

I'm excited to keep you up-to-date on the market. If there's ever anything I can do to help you, or if you hear of someone else interested in real estate, you'll let me know, right?

If no

I understand. Is there anything else in the real estate realm I can help you with?

If yes, follow through on this conversation to see if you can get them what they

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need.

If they don't answer, leave a live voicemail and send a text.

"Hello [name]. This is [your name]. I hope you're doing great. Give me a call back when you get a chance!"

Text message example: "Hi [name] I hope you're doing great. I'd love to catch up when you have a chance."

Database 15: Thoughts about the Current Market Dialogue

Hi [name], I have a real estate question for you, for a change. Let me know if you have 5 minutes.

I'm reaching out to past clients and close friends to ask — what do you think about [real-estate-related current event/issue]?

Database 16: Suggesting a Second Opinion Dialogue

Hi, Have you thought about interviewing at least one other agent just to see if they might bring different value to the table? I highly recommend it; it's very common in our industry to weigh options this way, and it's a great way to ensure you're getting the best possible representation without causing any offense.

Open House Dialogues

Open House 1: Database Invitation Dialogue

Hi *[Name]*, it's *[Your Name]*! How are you doing?

Let them respond—engage briefly in rapport building, and then transition.

I won't keep you long—I just wanted to share something exciting! I'm hosting an open house this weekend at a great home in [neighborhood/street name], and I'd love for you to come by and say hi if you're around.

Optional details if relevant:

It's [Saturday/Sunday] from [time] to [time], and it's a [2-bedroom cottage / cool historic home/newly renovated place] that I think you'd enjoy seeing—plus there'll be snacks!

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Optional close:

Even if you're not house-hunting, it would be great to catch up—and of course, if you know anyone looking for a home in the area, please send them my way or bring them along!

Open House 2: Inviting Neighbors

Hello! This is [your name] with [Market Center name]. I'd like to invite you to the open house at [address] on [date and time].

Feel free to drop by, and if you know of anyone from work or a friend that would like to come with you, please feel free to bring them.

By the way, when I find a buyer, I'd like to be able to share with them what people like about the neighborhood. May I ask you what it is that you like about the neighborhood?

Excellent! And, if you were to move, where would you go next and when would that be?

Open House 3: Open House for New Listing Invite

Hi there, I'm [your name] with [Market Center name] and I wanted to take a moment to introduce myself. You may have noticed the home a few doors down is for sale. I just listed it this week and made a commitment to the sellers that the entire neighborhood would know about this new listing.

Often homeowners know someone that might be looking to move to the neighborhood. Do you know anyone interested in moving to (name of neighborhood)?

Here is some info on the house and an invite to the open house this weekend. Before I leave, do you know anyone in the neighborhood who is thinking of selling?

Ok. It was a pleasure meeting you. I look forward to seeing you at the open house!

Before engaging in-person, always consider your jurisdiction's or neighborhood's rules and regulations regarding both solicitation and public health and safety. Also keep your personal safety in mind at all times. Consult your local real estate association for best practices.

Open House 4: Vendor Partner Dialogue

Hi [vendor's name], I'm [your name], a real estate agent with [Market Center name]. I'm hosting an open house at [Property Address] this weekend and looking to partner with a great local [lender/insurance agent/etc.] to co-host and sponsor.

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The idea is to create more energy and value at the event—you'd be there as a resource for buyers, and we can display your materials at the table. I'll be promoting the open house online and through my network, and I'd love to include your name and logo as a sponsor to help boost your exposure.

I've found that when we collaborate on these events, we can both meet new people, build trust with potential clients, and increase referrals. Would you be open to teaming up for this one?

If they say "Yes," continue:

Great! I'll take care of the setup and promotion—all I need from you is [a small financial contribution toward refreshments/signage] and your marketing materials. You can also bring a giveaway. My goal is to provide value for you, too.

Open House 5: Greeting Dialogue

Welcome in. I'm [your name]. What brings you by today?

If they say, "I'm just looking":

We typically find that people come to open houses either to look for a home of their own or find the value of their house. Do you live near here?

Or:

Feel free to take a look around and let me know if you have any questions. Would you like to hear about the house's highlights before you get started?

Or, offer your hand and wait for them to say their name.

Thanks so much for stopping by (name)**. Have you been out looking for homes for a while, or are you just starting the process?**

Open House 6: Guest Information Capture Dialogue

Direct: Property Updates

This home is getting a lot of activity, and I'll be sending out updates on offers and price changes.

What's the best email or phone number to keep you in the loop?

Indirect: Value Giveaway

I've got a thorough market update for this neighborhood that shows all the recent sales and trends. If you'd like, I can send it over. What's the best email address for you?

Indirect: Future Opportunities

Are you mainly browsing or actively looking right now? ... Either way, I see a lot of listings before they hit the public sites — want me to send you those early? What's

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the best contact for you?

Indirect – Friendly Closing

Thanks for coming by! If you want, I can text you the details in case you think of questions later. What's your number?

Always jot down quick notes about guests' situations (downsizing, first-time buyer, just browsing). It makes follow-up feel more personal. Ask for email first, then ask 'and if faster what's a good number i can text' to capture their phone. Then ask 'and if i wanted to pop something in the mail where can i send it' to capture address.

Open House 7: Responses to Visitors Hesitant to Sign-In Dialogue

If people are hesitant to sign in, offer a "Value Add."

Example 1:

If you sign in, I can send you the full list of recent upgrades and the utility cost averages for the last year.

Example 2:

I'm tracking three more homes in this neighborhood hitting the market soon; I can send you those addresses before they go live.

Example 3:

If you're worried about your furniture fitting, I can email you the digital floor plan with the exact room dimensions.

Open House 8: Represented Buyer Response Dialogue

Option 1: Confirm & Serve

That's great that you're already working with an agent. I'll make sure to leave space for them to guide you through next steps, but while you're here feel free to explore the home and let me know if you'd like any details about the property itself.

Option 2: Stay in Lane

Perfect, thank you for letting me know. I'll keep my role simple today—just here to answer questions about this home, the neighborhood, or the process the seller has set up. That way, when you chat with your agent later, you'll have

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everything you need. How's that sound?

Option 3: Add Value, No Pressure

Good to know you've got representation. While you look around, would you like me to share some quick highlights about the property—like age of the roof, schools, or recent updates—so you can bring those notes back to your agent? Or I can send you a link now that you can forward to them?

Option 4: Rapport & Relationship

Great, I love that you're working with someone. I'll just focus on giving you the best possible tour of the home itself. If you want me to follow up with your agent directly with any details, I'm happy to do that too. Does that sound alright?"

Option 5: Friendly Close

Thanks for sharing that! I'll let you take your time walking through—just know I'm here if you'd like specifics about the seller's timeline, information , or features of the home. Your agent can handle the rest!

Open House 9: Reason for Sale Dialogue

Visitor asks why the owner is selling their property.

That's a fair question! There's nothing wrong with the home—the sellers are actually [downsizing/relocating for work/moving closer to family]. They've loved the natural light here, but it's just time for their next chapter. Are you looking for a home that gives you more space than where you are now, or are you just testing the waters?

Open House 10: Response to Questions about the Property

I want to make sure I give you the most accurate information possible. Let me check the seller's disclosure statement and follow up with you (or your agent) this afternoon. What's the best email or phone number for you?

Open House 11: Response to Questions about the Neighborhood

It's a very friendly pocket of the neighborhood. I've noticed a lot of people out walking dogs and gardening today. You might actually want to take a quick stroll down the block after the tour to get a feel for the vibe!

Be careful with "Fair Housing" laws. Avoid describing neighborhoods based on protected classes. Stick to objective observations like "quiet," or "near the park".

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Open House 12: Other Property Options Dialogue

Since this home wasn't quite the right fit, what are you looking for that this one didn't offer? Are there any features that this house has that are important to you?

Visitor responds with preferences.

Based on that, there is another home open right now on [street name]. It has [#] beds, [#] baths, and that [Special Feature] you're looking for. It's open until [time]—can you go by now?

Perfect. Here is a list of a few other houses to give you more perspective on the neighborhood, too. Take my card. I'd love to hear what you think of that one compared to this. Can I call you this evening between [time] and [time] to see what you thought?

Open House 13: Soft Close Dialogue

Before you head out, I'm curious—on a scale of 1 to 10, how closely does this place match what you're looking for?

Visitor responds.

Got it. That's helpful feedback. I actually know of a listing coming up two streets over next week with a massive island and an open floor plan. If you'd like, I can send you the preview link before it hits the public portals?

Open House 14: Post-Open House Follow-Up Dialogue

Hello [buyer's name],

This is [your name] with [Market Center name]. I wanted to thank you for stopping by the open house at [property address] this weekend. I hope you enjoyed the tour and had a chance to get a good feel for the home.

I'd love to hear your thoughts. What did you like about the property? Were there any features that stood out or questions that came up after your visit? What did you think of the neighborhood? Price? Any feedback for the sellers?

You know, given the current real estate market, good homes are moving quickly, and buyers are seeing real opportunities for both value and selection. If you're considering making a move, now could be a great time to take the next step. I can provide you with recent sales data and help you understand what's happening in the neighborhood so you can make an informed decision.

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Would you like to schedule a private showing, discuss financing options, or see similar properties that fit your criteria? I'm here to help with any questions or next steps you're considering.

Open House 15: Post-Open House Next Move Dialogue

Hi [buyer's name],

It was great meeting you at the open house for [property address]. I appreciate you taking the time to come by!

I wanted to check in and see if you had any lingering questions about the home, the neighborhood, or the buying process in general. With the current market conditions, it's important to have a clear strategy, whether you're ready to make an offer or still weighing your options. Buyers are finding better values today than a year ago here in [your area].

If you're interested, I'd be happy to set up a time to discuss:

- How to position yourself as a strong buyer in this market and how to get your closing costs or fees covered by the seller in most cases.
- Recent trends and pricing in your preferred neighborhoods.
- What to expect if you decide to move forward with an offer.

No pressure. My goal is to make sure you have all the information and support you need to make the best decision for you.

Would you like to schedule a quick call or meet for coffee to talk through your plans? Let me know what works best for you!

Open House 16: Monday Circle Prospecting Follow-Up Dialogue

Hi there. This is [name] with [Market Center name]. We spoke on Thursday (or I left you a message on Thursday) and wanted to let you know how the open house at [property address] turned out. Is this a good time?

If yes:

Awesome, thanks for taking my call. We had [#] number of people through the open house and received [#] number of offers. We have [#] number of buyers that are still looking to move into your neighborhood. Do you know of any of your neighbors that are moving before the end of the year?

If no:

Okay, have you seen anyone in the neighborhood that maybe has a pod in front

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of their home?

If yes or no, follow up with further questions:

Have you considered selling your home?

If yes, close for the appointment.

If no, follow up with further questions:

I get it, you live in a great area! Listen, I really appreciate you taking the time to chat with me today. I'd love to thank you by sending you an updated market analysis of your home. Could I get your email address so I can send that over to you?

If yes:

Awesome, any updates to your home that I should take into consideration before I send this over to you? What's the best email address to reach you?

Social Media Conversations

Social Media 1: New Follower Message

Hi [name], thanks for following me! I appreciate your support! Are you or someone you know interested in buying, selling, or investing in real estate?

If they say they're just looking:

Ah, I see. If you know of anyone looking for a great home like this one, would you mind sending them my way? Thanks, and I look forward to seeing you.

Social Media 2: Listing Post Like/Comment Message

Hi [name]! My name is [your name] with [Market Center name]. I saw you liked/commented on my listing at [address]. It's an amazing place, and I don't anticipate it being on the market long.

Are you thinking of buying or selling in the near future?

If they say they're just looking:

Great! I'm the local real estate expert in [region/neighborhood]. Most people who are following me are thinking about a move or curious about the worth of their home. How can I be of service to you?

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Social Media 3: General Post Message

Option 1: The "Local Expert" (Best for food/venue posts)
That looks incredible! I've been meaning to try [place name]—was the service as good as the food looks?

Option 2: The "Home Decor/Reno" (Best for interior posts)
Love what you've done with this space! That [specific item/color] is such a great choice. Did you do the work yourself or hire it out?

Option 3: The "Community Connector" (Best for local events/parks)
I saw you were at [event/park] today! We were thinking of heading there this weekend—was it super crowded or still pretty manageable?

Option 4: Short & Sweet (Best for life updates)
Huge congrats on this! Such an exciting milestone. How are you guys celebrating?

Social Media 4: Market Update Video

Wondering what's really happening in the [city name] housing market this month?

Here's the quick version:

- **Average price: $___**
- **Homes selling in ___ days**
- **Inventory up/down ___%**

If you're thinking about buying or selling this fall, now's the time to plan. DM me for your local market snapshot. #MarketUpdate #RealEstateTips

Social Media 5: New Listing Post

New listing alert! This one checks all the boxes—open concept, natural light, and a backyard built for entertaining. Who do you know looking for a home like this in [City Name]? #JustListed #RealEstateAgent #DreamHome

Do this one with a best deal on the market type listing. Maybe it's yours or one in the MLS you can market out with permission. This keeps you top of mind and shows you're in the business of real estate.

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Social Media 6: Client Testimonial Post

Every review means the world. Helping families find their perfect home never gets old. #HappyClients

Insert client quote graphic or short video clip

You can do this with actual clients or people who would/can appropriately endorse you and your services.

Social Media 7: Staging Before and After Post

This is what staging can do! Swipe to see the difference a little design magic makes! Selling soon? Let's make your home the one buyers can't stop thinking about. #HomeStaging #ListingPrep

Using a video supported by graphics is best here. Think a video showing you doing it yourself maybe and then show it in a fast forward clip. Same idea for 'before and after' remodel projects or updates

Social Media 8: Closing Day Celebration Post

Another set of keys handed over! Congratulations to [first name] on buying your first home in [neighborhood name]! If homeownership is on your goal list, we should chat soon. #ClosingDay #NewHomeowners

Pictures work best here and don't be afraid to tell part of the story! For instance if it was touch-and-go in the middle because of a home inspection issue and you had to negotiate to save the day, etc.

Social Media 9: Real Estate Tip Post

Did you know you don't need 20% down to buy a home?

Most of my clients put 3%–5% down and some qualify for zero-down programs.

Want to see what's possible for you? Let's talk. #HomeBuyingTips #MortgageMyths #RealEstateHelp"

Social Media 10: Neighborhood Feature Post

Welcome to [neighborhood name]—one of [city name] hidden gems!

- **Local favorite: [coffee shop]**

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- Fun spot: [local park or attraction]
- Average Home Price: $___

Thinking of moving here? Let's go on a neighborhood tour. #LocalExpert #Explore[city name]

Social Media 11: Motivational Post

Success in life comes from consistency—not perfection. Show up, stay focused, and the results follow.

#MotivationalMonday #FurtherFaster

Social Media 12: Ask Me Anything Story

Buying or selling questions? Drop them in the box. I'll answer them all this week. No pressure, just real answers.

#AMA #AskARealEstateAgent #RealEstateQuestions

Social Media 13: Behind the Scenes Post

What does a day in the life of a real estate agent really look like? Spoiler: It's not all showings and coffee. Here are 10 seconds from my day: inspections, negotiations, and maybe a quick gym stop.

#DayInTheLife #BehindTheScenes

Social Media 14: Why I Love This Business Post

After [number] years in real estate, the best part hasn't changed—the moment a client realizes they're home. Every closing is more than a transaction; it's someone's next chapter.

#RealEstateAgentLife #PurposeDriven #RealEstateJourney

Social Media 15: Myth-Busting Post

MYTH: You have to wait for rates to drop to buy.

FACT: You can refinance later, but you can't go back in time and buy at today's prices.

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Want to run numbers on what you can afford right now? DM me.

#RealEstateMyths #BuySmart”

Social Media 16: Find the Value of Your Home Post

Curious what your home is worth right now? The market has changed and your value might surprise you. Comment ‘HOME VALUE’ below or DM me your address for a free, no-pressure estimate. #HomeValue #FreeHomeEstimate

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