







SPHERE MARKETING HANDBOOK v.1

TIPS AND TRICKS TO HELP GROW YOUR BUSINESS

Sphere marketing is about developing and nurturing relationships over the long haul. Yes, this takes time, but like a freight train, it also creates momentum once it gets rolling. Once people know we have their best interests in mind, not only will they hire us, but they will tell other people to do the same. Eventually our business gains unstoppable momentum.



CONTENTS

-  Building Your Initial List
CHAPTER 1
-  Reaching Out to Your Database
CHAPTER 2
-  Staying in the Flow
CHAPTER 3
-  Add New People to Your Database
CHAPTER 4
-  Tracking/Fine Tuning Your Database
CHAPTER 5
-  Provide Premiere Service
CHAPTER 6

There are many ways to make money in real estate, there are many ways to generate leads in real estate, and there are many ways to distract ourselves in real estate. In the end, I believe that if the desire is to build a solid business, the best course of action is to pick ONE strategy and pursue it with vigor. Agents who chase every shiny object, end up doing many things very poorly, while failing to master any one-thing.

Being exceptional at one strategy is the key to success in any business, and this booklet is designed to help you become a pro at one thing in your real estate business:

Marketing to your sphere!

Sphere marketing is for anyone who realizes that churning and burning through endless leads is exhausting. Sphere marketing is for those of us that see the value in nurturing relationships as we create a referral-based business. A business where our friends, family, and past clients become our biggest lead sources, as they CALL US, already knowing that we're the person they will hire. For most people, their home is their biggest asset, so sphere marketers understand that if we build strong relationships, our clients will entrust us with their biggest asset because they already know, like, and trust us.

Sphere marketing is about developing and nurturing relationships over the long haul. Yes, this takes time, but like a freight train, it also creates momentum once it gets rolling. Once people know we have their best interests in mind, not only will they hire us, but they will tell other people to do the same. Eventually our business gains unstoppable momentum.



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If this sounds good to you, then keep reading. The concepts in this handbook are what took my business from a handful of intermittent deals to nearly 20 million in sales in 2020. Keep in mind however, that it took me a few years to get all of the ideas in this handbook up and running. Don't feel like you must implement everything right away. This is a process full of experimentation and fine tuning. Pick an idea or two that resonates with you and implement it. Once you have the processes in place, add another one, and then another. Over time you will create a process that works for you as you build a referral-based business that allows you to expand your business all while working with people you love.

Sound good? Then, let's jump right in!



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When working with agents, I often hear “I don’t know many people... I only have 20 people in my database.” While that may appear true at first, the reality is that we all know way more than 20 people. We forget about our distant family members, or buddies from yester-year, and we expound the problem by intentionally leaving people off our list out of fear that they may judge us for suddenly reaching out after it seems the relationship has lapsed. Sound familiar?

It's totally normal to feel nervous about reaching out to people you haven't spoken to in a long time. I get it! I've experienced it. While we will cover some tips and tricks on how to reach back out to old friends later in this handbook, right now we will focus on one thing... Adding everyone you know to a singular list.

Remember, when we focus on too many things at once, we end up doing many things terribly. This is one of those times. Rather than wondering what you will say when you talk to someone, rather than asking yourself if they will think your weird for suddenly reaching out, rather than second guessing who to add to your sphere list, simply do one thing right now. Put EVERY... SINGLE... PERSON you know onto your list. The objective in the beginning is to get your list to at least 150 people. While I recognize that this may seem like a tall order, forget the difficulty and just start writing.

Getting Your List Started

Let me start out by saying that you can always cross people off your list later. Therefore, you don't have to worry about whether someone belongs on the list or not, yet. This first exercise is simple. Add as many people (that you have some type of relationship with) as possible to your list.



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In the next few sections, we will discuss some of the best places to look in order to track people down, as you get your list started.

Social Media Friends

The best place to start is Facebook or Instagram. Even if you don't use Facebook much anymore, you probably have a huge list of people on a singular list. Obviously, some of these people are close to you and some you won't even recognize. Remember, you don't have to add everyone, but Facebook provides a pre-made list of 1000+ people to scroll through and potentially add to your list. Add anyone that you know, especially if you have their email and/or phone number.

Not only will this exercise directly remind of people to add to your list, but it will also jog your memory about other people you may know. Let the creative juices flow and don't discriminate, yet. Put as many people down as you can. Remember the goal is to get to a minimum of 150 people (200 is better!)

Sidenote: There is a reason why I have selected the number 150. First of all, there is research out there that supports the idea that most of us have and can maintain approximately 150 relationships with people. Additionally, I have heard said by many successful mentors that a contact in a nurtured database is worth approximately \$1000. So, if you have 150 people that you are nurturing, then you should make around \$150,000 per year. However, I believe that if you follow this handbook, then your database could be worth nearly double that. I built a \$400,000 business off of a 200-person database list.



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Now that you have gone through Facebook, it's time to go through your mental rolodex of other people and continue to grow your list.

Family

Which family members are not yet on my list? Go through your family in your mind, in this order and write everyone down.

1. Immediate family (parents, siblings)
2. Extended family (aunt/uncles, cousins)
 - Once again, don't worry if you haven't seen them in a while. Remember that most family members want you to be successful and they will help if they can.
3. Family friends
 - These could be friends of parents, cousins, siblings, or anyone you know through family contacts. I have sold houses to many family friends. Who do your family members hang out with and do you have a relationship with any of those people?
4. Parents/friends whom you know through your kids or your kids' sports
 - Who are the people you connect with on the sidelines of your kids' sports?
 - Who are the parents of your kids' friends that you have connected with?
 - Who are the people you consider acquaintances, but whom you see somewhat regularly?
5. Who's on your Christmas card list

College Friends

1. Who were your roommates each year of college? Put them all down
2. Who did you hang out with in college?
3. Who were your neighbors in college?
4. Who did you meet in college who you still hang out with?
5. Former teachers you are still connected with (trust me, they would love to help if they can!)



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High School Friends

1. Who did you hang out with in high school?
2. Who were your neighbors in high school?
3. Who were your friends of friends that you are still connected with in some way (probably on social media)?
4. Who did you meet in high school who you still hang out with?
5. Former teachers you are still connected with.

Neighbors

1. Who were your neighbors when you were growing up?
 - Think about both adults and kids that you hung out with.
 - Start with immediate neighbors and then spiral out a few blocks to help you come up with more people.
2. Who were your neighbors in college?
3. Who are your neighbors now?
 - I added about 15-20 different households to my database list who were my immediate neighbors. My first listing was a neighbor and I sold close to 20 homes in my career due to neighbors moving or from referrals from neighbors.

Co-Workers

1. Do you have a side-gig? (Hopefully this handbook will help with that!) Who do you work with right now?
2. Who have you worked with in the past that you can add to your database?
 - I don't even know how many homes I sold to people I used to teach with. I added them to my database, stayed in touch, and it paid HUGE dividends.
 - Think back to all of your jobs since high school.



Other social accounts

1. Go through all your other social accounts and comb through all your connections. Add anyone who isn't on your list yet and who you have a connection with.
2. Below are a few accounts to consider
 - LinkedIn
 - TikTok
 - Myspace (Ok, maybe skip this one!)

Friends of friends

Go through your list of friends and family on your list already, and for each person, ask "who is this person connected to that I also know?"

- Yes, this may take some time, but remember that you are building your list that is the foundation for your business. The more time you put in on the front end, the more successful you will be.

Past Clients

If you're not new to real estate, then you have past clients.

1. Who have you worked with in the past that you lost touch with?
2. Who sent you a referral in the past?
3. Who did you enjoy working with?
4. Who had a great experience working with you, but you lost touch?

Other Connections

1. Who do you see at the gym?
2. Who do you play sports/games with?
3. Who do you run into "out in the real world?"



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Who are service providers that you can develop a relationship with?

1. Hairdresser
2. Garbage man
3. Contractors
 - a. Lawn care, construction, plumbers, electricians, etc.
4. Mailman
5. Manicurist
6. Massage therapist
7. Coaches, therapists, mentors (even if they can't hire you themselves, they know people and they will want to help!)
8. Barista

Maybe I'm optimistic, but I believe that building a list of at least 150 people from these suggestions is too easy. My hope is that you are closer to 200 after this exercise. With that said, if you are still below 150, then go back through the exercise again.

We all know more people than we think. The problem I see most frequently is that many of us fail to add people to our list because we rationalize why they shouldn't be on our list before we even write their name down. **DON'T REMOVE THEM BEFORE YOU ADD THEM!**

Rationalize later. Just put everyone down for the time being and see how many you can get. We will go over the steps to clean your list later. For right now, just focus on one step (getting everyone down first). We will focus on the next steps later.



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Chapter 1 Summary:

No matter our strategy in real estate, our database is the life blood. If you take the time to build out your list to at least 150 people then you are well on your way to creating a successful business where you get to work with people you love.

Key takeaways:

1. We know more people than we think
2. Don't discriminate when creating your initial list. Add everyone to your list and fine tune it over time. Don't eliminate people before you add them to your list.
3. Take the time necessary to go through your mental rolodex. It is worth the time to stop and think.



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CHAPTER 2: REACHING OUT TO YOUR DATABASE

Step 1 complete, and you now have a list that should generate at least \$150k per year!

The next step is straight forward, yet very easy to skip over. Don't make the same mistake I made for years by skipping this step.

Stop, and **CELEBRATE** your win! Seriously! Stop and recognize your efforts. Call someone close to you and share your accomplishment. Go out to a nice dinner. Have a glass of wine. It doesn't matter how you celebrate. What does matter is that you take a moment to consciously recognize your progress. It may seem trivial but recognizing that we are making progress is what keeps our energy up. So, before moving on to step 2, celebrate your win!

Back At It!

Not that you have a list of at least 150 people, and you took the time to celebrate, it's time to pivot and focus on the next step. Once again, remember to only focus on step 2 right now. You can worry about step 3 later. Step 2 is where you GET TO reach out to your sphere. This should be fun! You may call some, you may text some. You may even have to reach out to some through messenger services. No matter the case, this is where the fun begins!

The truth is that I've found it fun and sometimes therapeutic to call friends and family who I haven't talked with in a long time. We end up reminiscing and chatting about memories I haven't thought about for years. We get to catch up and see what each other is doing. It's just fun to talk with good people and in my experience, my energy after sphere calls is always higher than before I started.



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The Myth

When I first developed my database, I remember having conversations with my wife where I would find myself saying things like “They’re going to think I’m weird for calling them out of the blue”, or “They are going to think I just want to sell them stuff and they will be offended.” Can you relate? You may have different excuses, but I would venture a guess that you’re probably experiencing some form of hesitation about reaching out to people you haven’t talk with in a while. That’s normal and it’s ok! It also shouldn’t stop you from moving forward.

The truth is that we’re very good at making things worse in our mind then they are in reality. We tell ourselves stories and make comments that feel true, but simply aren’t. Then we end up sitting on the sidelines, pondering what will happen, before it happens, all the while forgetting to make it happen! You with me here?

The myth is that your friends will be offended, because after years of little to no connection, you suddenly reach out after getting your real estate license. It’s as if they will see right through your shallow little plan and turn away in disgust. Who knows, maybe I’m being overly dramatic here, but in my direct experience and in my experience when talking with other agents, the worst-case scenario mindset is all too common, but it doesn’t have to stop you.

Now, here’s the truth! If you start these conversations spewing real estate all over them, then yes, they will probably get offended. So, don’t do that. The intention of these calls is to re-connect, not to sell houses! If you come from a place of genuine connection, no one will be offended. And if they are, then cross them off your list. You don’t want negative people who don’t want to connect in your life anyway.



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These conversations are all about how you approach it. Remember that real estate is a long game. As much as you want a deal right now, it takes time. Successful realtors build relationships first. The money is tertiary. In other words, the business is born through genuine connection with people you care about.

These relationships begin with you picking up the phone and reaching out. Reignite your friendships and get to know them again. Ask about their lives with a genuine curiosity. They will naturally reciprocate by asking about your life. You can, in turn, tell them all about your life happenings, including the fact that you have your license now.

Whether you have a real estate license or not, you have two choices in life. Pick up the phone and reconnect with people you love or let those relationships die in a sea of meaningless online interactions. Most people don't have a catalyst that pushes them to keep relationships alive. You do, so be grateful for that! You have a reason to be the catalyst for long lasting relationships. You have the opportunity to be the one person who brings people together. That is not anything to shy away from that is something to be EXCITED and PROUD of!

So, pick up that phone and reconnect with your friends and family. My hope for you is that you end up loving it as much as I do. In fact, making calls to my friends and family, and bringing people together is BY FAR my favorite aspect of real estate.



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What to say

Ok, so you have finally worked up the courage to call your friends (that statement should sound a bit ridiculous, btw), now what do you say? What should you talk about?

Remember that the point of these calls is to reconnect. That means we need to ask a lot of questions about them. The goal is to hear about what they are doing and to make them feel like you are excited to reconnect (which you should). Through the human tendency of reciprocation, your friends and family will ALWAYS ask about your life too. That is when you get to fill them in on your family, business, and your personal shenanigans.

Sidenote: When someone picks up the phone, ask how they are doing followed by asking if "now is a good time to chat." If it's not a good time, simply ask when a good time to call back is. If they say something like "Sure, I have a moment. What's up?", but you can tell they are rushed, keep the call short and succinct. You could even say something like "I just wanted to catch up so we can talk later if you want." If they still are willing to talk even though they seem a bit rushed, then do your best to keep the conversation short. You want people to pick up when you call, so don't annoy them by keeping them on the phone at inopportune times.

Before the call, have a few questions loaded and ready to go. A great place to questions is to think of the acronym **FORD**. You may have heard of this before. It's such an easy way to keep the conversation going when you aren't sure what to talk about. **FORD** stands for:

F – Family
O – Occupation
R – Recreation
D – Dreams



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“Hey Sally! I was just thinking about you today and realized that we haven’t talked in a while! How are you doing?! How’s your family? How’s your work going? I saw on Facebook that you took a trip to (wherever) this year, how was that? Any other trips planned?”

Going through these 4 aspects could keep someone talking indefinitely if they want. These questions just get the ball rolling. Eventually they will ask about you and you can then fill them in on all things YOU. Once again, don’t hammer them with real estate. Mention you have your license and maybe even throw in a little plug, “I am in real estate now, so if you happen to hear anyone talking about buying or selling, I would be so grateful if you would through my name out there.”

“Absolutely” they say, and then naturally move the conversation on. You dropped a hint, but don’t linger on it. Talk about what you love about your work or why you made the move. Talk about how it gives you more time for your family. Just move the conversation on naturally and don’t beat them over the head with the fact that you want referrals. They heard you.

Keep in mind when making your ‘FORD calls’ that your energy speaks louder than your words. You can say all the right things, but if you sound like Eeyore, then no one will want to connect and open up with you. Your words matter, but your energy matters more. Here are a few strategies to raise your energy while talking to your sphere.

1. Smile when they pick up. Smiling while talking does come through on the other end, so don’t understate the power of a smile, even on the phone.



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2. Stand and/or walk around while talking. This will keep you from getting distracted by your computer and it may help get the creative juices flowing.
3. Make your calls early when you are fresh. I recommend making your calls between 9:30 and 11:00am. People put off work in the morning, so they tend to be more available. Conversely, they pack in their afternoons with catch-up work, and tend send unnecessary calls to voicemail. In the afternoons, your sphere be more busy and less energetic, but so will you! Bottom line, if you wait until the afternoon to make calls, you are setting yourself for distracted, less energetic calls.
4. Stay curious about them. Let them talk. People love to talk about themselves, so just letting them go on can make you seem like a fantastic friend, all while conserving your precious energy.

FORD calls are great, but isn't the other point of these calls to generate leads? YES! The idea is to generate leads, but we want to do it in a natural way. If we immediately throw real estate at them, the call will feel disingenuous and that will work against you.

With that in mind, if they ask you about the market or mention they are thinking about moving then they have opened the door for you to let your expertise shine. Don't hesitate to answer any questions they have or to demonstrate your knowledge of the market. The point is to wait to spew real estate on them until THEY open the door. Everyone loves talking about real estate,



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so I promise, if you stay in touch long enough, the conversation will eventually steer that direction. Be prepared when the opportunity rises!

The caveat

There are two caveats about making the calls 100% about the person on the other side. Sometimes you have golden opportunities to call your sphere with one goal in mind.... To tell them something exciting about YOU!

The first opportunity. If you are a brand-new agent and you just received your license, you should call every, single, person in your 150+ person database you created, immediately. I mean it. Call everyone and let them know that you just got your license. It's a very simple call and once again energy is everything. Simply call them up, say hi, ask how they are doing, and when they ask how you are doing, get super excited as you tell them the great news! "I just got my real estate license, and I can't wait to start serving my friends and family. Please let me know if you or anyone you know is looking to buy or sell and I promise I will take exceptional care of them!"

The point of this call is obviously less about catching up and more about making a personalized announcement of this career change. You only get to do this once, so make the most of it!

The second opportunity – Changing brokerages. Calling people directly to let them know you have changed brokerages is perfectly acceptable. Once again, call, ask how they are doing, and when they ask about you, let them know how excited you are about your new move. Tell them about how your new brokerage is going to make your clients experience even better. Talk up your teammates and leaders. Get excited and utilize this as another obvious call about business rather than simply catching up. Once again, this is once in a great while opportunity so take full advantage.



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How to get off the phone

Some people love to talk, yes? Sometimes it makes sense to engage in an hour-long conversation and sometimes it doesn't. Before you call someone, try to set a mental time frame for when the call should end. I usually try to make each call 15 min or less, but I will go longer if I am engaged or feel that it is necessary. So, when someone is going on and on, how do you get off the call without offending them? Ultimately it depends on the situation, but it's good to have a few strategies in your back pocket.

1. Set the expectation up front. Let them know that you are calling for a quick 15-minute call up front. That way it's easier to cut it off if needed.
2. "I'm sorry I forgot to mention that I have another call/appointment in 5 min. I'm sorry to cut our call short, but I have to be off by 9:45." You can always set another time to connect if needed.
3. "I would love to continue this conversation, but I am about to (fill in the blank), can we pick this up again tonight or tomorrow?"
4. When there is a pause, simply say "it has been so great catching up with you. I've got to run, but I can't wait to catch up again!"
5. Set up an in-person meeting (1 on 1). We will talk about this more but setting up a time to continue the conversation is not only a natural way to close a conversation, but it is a cornerstone to growing your business through your sphere.



Chapter 2 Summary:

Good real estate agents are connectors. They connect with countless people, and they look for ways to bring people together. This is by far my favorite part of being a realtor because I get to socialize as cornerstone of my success! Rather than being nervous about what other people may think when you call, enjoy reconnecting with people you haven't talked to in a while. This should be fun!

Key Takeaways:

1. Make the calls about them. Ask lots of questions and be curious about everything they have going on in their life.
2. Make sure they are in a good place to chat before you start asking a bunch of questions.
3. When they ask about you, make sure to mention real estate and the fact that you would love to serve more people, but don't dwell on it unless they have questions about real estate. These calls are about relationship building, not selling. However, if they have questions about the market, utilize this time to showcase your expertise.
4. It's ok to call specifically to express your excitement when getting your license or moving brokerages.
5. Unless you want to stay on the phone for an extended period of time, try to keep the calls to 15 minutes or less.



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Creating and calling your sphere database is a fantastic start to growing a sphere-based business. However, staying in flow involves more than an occasional call. It's about building relationships over the long haul with friends and family, so they know what you do and more importantly, so they know, like, and trust you.

Having a sphere-based business is about attracting people you love and then nurturing those relationships. By nurturing your relationships with great people, not only will you grow a very productive business, but your sphere will continue to grow with great people as your friends and family refer you out. Most importantly though, a sphere-based business will make your job SO MUCH FUN! I don't know about you, but the idea of having fun, building strong relationships, and growing my business all at the same time sounds pretty good to me!

How To Attract People You Want To Work With

Life and business are much easier and much more fun when we surround ourselves with great people. It's for this reason that I never stuck with shotgun approach systems like door knocking, cold calls, or open houses. Not that there's anything wrong with any of those (we will come back to this later) but if you've read this far already, then I would assume you would agree that working with people we love is the best way to build a business. So then, how do we do that?

I've door knocked, cold called, and hosted open houses. I saw some success with it and made a little money, but in the end, my biggest problem with those strategies was that I didn't have any control over who I interacted with.



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With Sphere marketing, the idea is that we spend our time developing relationships with people we already like and as we develop those relationships, they connect us with more people like them. You with me on this? Like attracts alike.

Therefore, the more we take care of our sphere, the more they refer people similar to them, which in turn grows our sphere with more people we love to work with. By simply taking exceptional care of a small group of targeted people, we can shape who we have in our professional database. This means we are less likely to have that dreaded “nightmare client” and much more likely to have revered “dream clients”.

Authenticity Counts

There’s another reason that cold calling didn’t work for me, personally. That type of strategy wasn’t aligned with me. I’m a relationship guy and if you’re reading this, I would assume that you’re a relationship guy or gal too. If we’re relationship people, then we must show up authentically. In other words, don’t try to impress anyone. Simply provide top shelf service, demonstrate excellent knowledge, and build genuine relationships.

When we authentically connect with people, it means we are true to ourselves when we interact with others. We are not trying to be something for someone else. Of course, this is not that same thing as arrogance. The idea is to show up the same way we want other people to show up for us. If we want people to treat us with respect, we treat others the same way. If we want other people to be on time, we need to be on time ourselves. It’s the golden rule!



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If we show up authentically, not only are we more likely to attract people we align with, but we will also turn off people who we don't align with. That is a good thing!

If you are being genuine/authentic and you are in alignment with your value systems when interacting with people, don't worry about offending people. If anyone gets upset when you are being yourself, then they have just done you a favor. Remove them from your list and focus on the people who resonate with your authentic self.

Like many realtors, I am people pleaser to a certain extent. I want people to like me, and I don't want to sabotage that next deal by writing someone off too early, but I have learned over my 10+ year career that when we aim to please at the expense of our authenticity, the following tends to happen:

1. We spend an exorbitant amount of time and energy trying to be someone we're not for someone else's satisfaction. It's exhausting!
2. We get caught up in the most stressful and least enjoyable transactions.
3. If we do close the deal and IF (big IF) we happen to get a referral (unlikely to get a referral if we don't align with our client), the referral will probably be another challenging client.

So, yes, we may get more immediate transactions by going with the shotgun approach to marketing. Once again, I am not saying that's a bad way to build a business, but that's not what this handbook is about.



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This handbook is about marking to a targeted group of people so we can fine tune our database and refine our list to people we really love working with. It may take a bit more time to get this train moving, but developing long lasting, authentic relationships allows us to work with the people we love while we create raving supporters of our business.

The A's, B's, and C's

Any adult knows that it's a terrible idea to rank our kids, even if they ask. However, when it comes to your database, you will have to rank your friends. I know this sounds a bit harsh, but it's a valuable exercise and it's not as bad as it sounds.

Keep in mind that when I say, "rank your friends", I'm not saying to rank them in terms of who you like better. Although, I guess you can if you want, but you better keep that list hidden! Rather, I am challenging you to rank them in terms of your relationship strength.

Your A's

A person labeled as an 'A' is someone very close to you. Family and good friends. You see these people on a regular basis. They definitely know you're in real estate and if they are moving, you know they will use you. If they hear anyone else talk about moving, they are very likely to throw your name out there as well. A's also include people in your sphere that have used you as their agent in the past and that would likely use/refer you in the future. This will likely be about 15-20% of your database.



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Your B's

A person labeled as a 'B' is someone who you know well. You may only see them occasionally, but they are a friend. They know you are in real estate, and it is likely that they will call you first if they are thinking about moving, but not as guaranteed as an 'A'. They're likely to refer you out, but it's also possible they don't, because they may have a deeper relationship with another agent.

Your C's

A person labeled as a 'C' is more of an acquaintance. You both know each other, but your relationship is still growing, or it may even be a person you reconnected with after losing touch for a few years. You are nurturing or re-developing relationships with your 'C's. People in this group might use you as their agent, but there's a good chance they have a stronger relationship with a different agent in their sphere. This will likely be the largest group on your list. At least at first.

The reason to rank your relationships with your peeps is so you can look at your list and ask one, simple, question. **How do I move my C's to B's, and my B's to A's?** This one question has potentially been the most valuable question I've asked in my business. This question should get the creative juices flowing as you begin to ideate about how to connect and engage with more of your people. Trying to answer this question should ultimately take you down a path of developing ideas that will create deeper relationships with everyone in your sphere.

So then, how do we move our C's to B's, and my B's to A's



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Ways To Stay in Flow and Connect

Now that you have a solid database that's chalk full of people you love working with, let's shift gears and talk about all the ways to stay in flow with your friends and family. I am going to list as many ideas as I can here, but there are countless ways to stay in front of your sphere, so get creative and focus on stuff you love doing.

Sidenote: As I mentioned above, there are countless ways to stay in flow, so don't try to do them all at once! I mean it! When we take on too much, we end up doing lots of things terribly. So rather than falling into that trap, pick 2-3 things that resonate with you and do the "small few" really, really, well. Once you have mastered the 'small few', add one more, and then one more, and then one more. Over time you will have a comprehensive plan.

Before I go too deep here, I would like to bring up the word authenticity again. Keep in mind that some of these ideas will resonate with your personality and will work well with your sphere. Others may not. That's ok. I know what I enjoy doing. I know what works for me and my peeps, and I know what doesn't. It has been a form of trial and error, but in the end, stay true to what works for you, and then do those things REALLY WELL!

I know I just said to pick the ideas you like the most, but the first 3 items listed here are as near a requirement as we will get. If you do the first 3 things on this list really well, I promise you will have a very successful business before you know it. Skip them at your own risk.



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Make Regular Phone Calls

Call or text (depending on how THEY like to be contacted) every contact in your sphere once per quarter. I will give more info on how to track this later, but for now, just know that calling your ENTIRE database every quarter is imperative to building and maintaining your relationships. Here are some reasons to call:

1. Wish them a happy birthday.
2. Social stalking. If they post something, reach out.
 - Get better soon
 - Congratulations
 - I'm here to help
3. Someone else mentioned your name so I thought I would reach out and say, "Hi".
4. You popped into my head today so thought I would call.
5. I saw a house you might love.
6. I see you haven't opened your portal in a while.
7. I see you have 'hearted' some properties on your home search.
8. Let's get together and catch up.
9. Just calling for business. Trying to expand my business, and I wondered if you know anyone who may be looking to buy or sell.
 - Maybe once a year depending on relationship
10. Invite them to an event.
11. Checking in to make sure they have everything they need (someone in your funnel).
12. Saw you moved and was wondering why you didn't use me.
 - Ouch! As much as this situation hurts, this is a good opportunity to get feedback. Go into the call with genuine curiosity and be ready to learn.



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Annual CMA's

I know CMA's take time to create. I know it's a challenge to get motivated to do them, but your friends and family want to see them! What better way than a Market Analysis to remind your people what you do for a living.

Sidenote: I use the term CMA with other professionals who know what it means. Our clients don't know what that is so don't use the term. I like to use the term "Annual Market Analysis on your home". People know exactly what that is.

Once again, I will go into detail about how to track these in the next chapter, but CMA's are one of the best ways to remind your friends what you do and to demonstrate your market knowledge. Yes, I know there are a million software's that will do monthly CMA reports for your sphere, but these are not good enough and more than likely, your people already receive a few of these in their inbox every month. While I would recommend keeping everyone on an auto CMA software, a personalized, annual CMA sets you apart from everyone else in the market.

Doing a personalized report shows that you go the extra mile. Not only that, but a personalized report is way more accurate than a computer-generated report. This gives you an opportunity to discuss relevant sales and current market trends with your sphere.

Each year, on the same date, put a report together for your client. After completing the report, call them and say "Hey, I completed your annual market analysis and wanted to share the details with you."



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Do you have 5 min to chat?" If they say no or you leave a voicemail, check back in one more time. The idea is to get them on the phone do discuss, but you don't want to annoy anyone either. If you don't reach them on the phone by the 2nd attempt, leave some details of your findings on their voicemail (or type it up in your email) and email the report over. Even if you don't hear from them, they see it. I promise!

When you initially reach out some people will say "I don't want you to go to the trouble of doing a report for me". What they are secretly saying is "I don't want you to try and sell me stuff." If they say that, simply let them know that doing this is no trouble at all. This is something you do for all your friends and it's a value add that you provide for everyone.

Reassure them that you are not trying to get them to sell, it's simply an additional data point so they can keep tabs on the value of their biggest investment. Then remind them that you will send them a report every year so they can track their home's value. Eventually they begin to expect the report, which is a good thing!

Face-To-Face Connections

This is the third and final "must-do" when it comes to staying in touch with your sphere. In a world where social and virtual worlds are taking hold, it is getting harder and harder to connect with people face to face. Even though most people hate it, more and more people are simply accepting the idea that we don't need to see each other in person as much. So, if they won't extend the invitation to hang out, who will? I know who... YOU!



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Depending on how close you are to someone, as a rule of thumb, you want to see them between 2 and 4 times, in person, per year. More if possible. This means when you talk with them, invite them to events, or see if they are free for coffee, lunch, or a happy hour. Looking for natural ways to connect with your friends in person is one of the best ways to nurture your friendships. You will learn about their challenges, struggles, and life circumstances. They will ask you about your life and you will get to fill them in on your life and business. And maybe most importantly, they WILL appreciate your consistency in getting together. Most people stay home and accept their inbound lifestyle, but not you! And people will love you for it. Whether they admit it or not, people want to connect, so be the force for good and get together with your friends. It will enrich your life, their life, and your business.

Host Parties and Events

Gathering people together is one of the best ways to develop and strengthen relationships. Just like phone calls and 1 to 1's, many people believe they don't have the time to make these events happen. So, even though they wish they gathered with friends and family more, they simply won't take the initiative to make it happen. Once again, that's where you come in!

Yes, hosting parties and paying for group events will cost you money, and yes, they take time to plan, but not only are these events a blast, but they're also great opportunities to connect with your friends, and your friends', friends. It may take a little time and money to make it happen, but by taking the initiative you get to hang with people you love, and meet new friends, as you deepen your relationships with everyone involved.



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People will appreciate the fact that you took the time to bring everyone together and they will remember that when it comes time to select a Realtor. People want to work with people they know, like, and trust, and when you are consistently interacting with your sphere in a laid back, fun environment, people will get to know you better, they will like you more, and they will develop a deeper level of trust.

Here are a few ideas for parties and events:

1. Day at the lake
2. Rent a movie theater
3. Spring kick-off BBQ
4. Poker party
5. Holliday party
6. Pictures with Santa or family photo day
7. Happy hours
8. Golf tournaments
9. Day at the park
10. Top Golf
11. Box seats for games
12. Holiday or Halloween parties
13. Tailgate parties for big games
14. Group camping trips

The point here is to be the catalyst for connection. Organizing fun events is a great way to stay connected with large groups of people as you build rapport, and to add value to your friends and families' lives.



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Personal Notes

I'll be honest, I didn't want to do these at first because my handwriting sucks. Seriously. What a lame excuse, right? However, I decided to give it a try and I am so glad I did. Not only did I love writing feel good notes to people, but I was exhilarated every time I got a call or a letter back expressing their gratitude for the note. Very few people do things like this so if you want to set yourself apart while making people smile, take the time to write 2 personal notes every day.

Sidenote: This is a great way to get addresses for people so you can add them to your CMA list and Christmas card list. Tell them that you want to send them something and you realized you don't have their address.

The idea is to write something that expresses your gratitude for them, makes them feel good, or congratulates them on something. That's it. Keep them short and sweet and write something that will brighten their day.

Direct Mail

Yep, direct mail. In addition to personal notes, there are tons of things you can send to people through the mail, and they will open them. I send all of these to my sphere, and it is just another way to remind them I am in real estate while providing value. I try to send at least 1-2 pieces of mail each month. Here are a few ideas of things to mail.

1. Christmas cards
2. Baseball, hockey, basketball, or football magnets for fridge
 - Don't skimp. Spend the extra money and send the nice ones
3. Market trends.
 - Often times title companies can mail hard copies on your behalf.



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4. Paid coupons services like Boomerang

- A coupon to a local shop with a picture of your precious mug, shows up each month without any work on your end. People use these and they appreciate them!

5. Personal notes

6. Invitations to events

Homiversary Calls And Gifts

When I close a sale with any buyer, I put their closing date in my phone and I have it repeat every year, indefinitely. Every day, when I see a Homiversary, I call or text that client and wish them a “Happy 5-year Homiversay!” It’s kinda silly, but people laugh, and they like it.

If you want to really take this up a notch, send them a gift on their Homiversary. I have done Bundt cake towers for years. Yes, it costs money, but when we spend money setting ourselves apart from the pack, we make every penny back ten-fold!



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Chapter 3 Summary:

Most people believe they don't have the time or the energy to be a connector. Therefore, they settle, and they wait for someone else to do it for them. Be their connector! Be the person who makes them feel appreciated. Be the one who brings people together. That is what staying in flow is all about.

Key takeaways:

1. Be authentic so you can develop deeper relationships with people you already know and so you can connect with more people you love.
2. There are many ways to stay in flow. Focus on the big 3 (quarterly calls, CMA, face-to-face connections).
3. After you have mastered the first 3, begin adding new flow strategies.



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It seems to me that this is where most agents get frustrated, which is why I hit the first section of this handbook so hard. Most agents say they don't have enough people to market to, but the reality is that once you really look at it, you already have plenty of people to build a successful business. Now, as we move to chapter 4 you will learn strategies to add more people to your sphere, so your business continues to skyrocket to the moon, baby!

There are a million different ways to add people to your sphere. I am only going to touch on a few here, but if your goal is to grow a long-lasting business, then you must experiment with new ways to GROW your database and then nurture the heck out of it!

In a perfect world I would summarize my ideal sphere building exercises like this: Look to meet new people, doing the things you already love, with people you already love.

In other words, don't reinvent the wheel. Stay true to who you are and keep doing the things you enjoy doing. Just do them more, find ways to bring in new people, and engage with people while you do them. Pretty good strategy, right!?

With that said, there are other ways (which I also will touch on) to build your database that may not be your favorite things to do in the world, but they will add people to your sphere so you can nurture those relationships over time too. No matter how your people get into your sphere, continue to build rapport. That way, you don't have to do things like cold calls, internet leads, or open houses, forever. Only until your database is big enough to keep you as busy as you want to be.



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Adult Leagues or Clubs

I love to play any game out there. Basketball, volleyball, softball, flag football, and many more. In retrospect of my business journey, I have learned that these groups have been one of the most productive referral sources for me. I believe the reason why is because when I am with these groups, I am doing something that I love, with friends I naturally connect with, and I'm in a state of flow when I am with them.

Given that kind of environment, one would have to intentionally try to NOT get referrals, wouldn't you agree? People hire and refer people that they know, like, and trust. Leagues and clubs are one of the most authentic ways to build that kind of rapport. Keep in mind, you don't have to join sports leagues like I do. Leagues or clubs could refer to anything, from poker, to book clubs, to knitting groups. All that matters is that you are with people you like, doing things you love.

So then, let's brainstorm:

What hobbies do you love?

What groups do you wish you could spend more time with?

- Good news, now you have a reason to do just that!

What leagues or clubs do you already participate in?

- Could you do a better job of "hinting" that you are in real estate

What activities do your favorite people participate in?

- Could you join them?

What did you do for extra curriculums in High School or college?

What do you do in your free time that you wish you could do more often?

What groups do your local recreation centers offer?



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Here's the great news! Not only should you do more things you love with people you love, but it is imperative to the growth of your business. YOU'RE WELCOME! You now have permission to slack off and have fun in order to grow your business.

Kids Sports and Other Clubs

Like it or not, when our kids participate in sports or other activities, we are unwittingly thrust into new social groups. We see these people week in and week out and we have countless opportunities to make small talk. Many times, these relationships of chance turn into great friendships.

It's not necessary to force feed the idea that we are in real estate. It will naturally come up in conversations and the more we interact and seek to understand others, the more they will think of us for anything real estate. Once again, it's about building relationships over time, not getting the sale.

One other thing you may consider here, is to coach. As the coach or leader, you're in a place of power and respect. This will help boost your clout with people, which is a good thing. However, as the coach you spend more time with the kids and less time with the adults, so there is a tradeoff. In the end, coach if you love doing it and leave it to someone else if it's just another chore.

Hosting Events Where Friends Are Encouraged To Invite Others

I've said it before, and I'll say it again. As a sphere marketing guru, you are the connector. Meaning you will throw more parties and bring people together more frequently than anyone you know. One of the keys to a good event is to create an environment where people are encouraged to invite their friends. This way, you get to meet new people, strike up new conversations, and add new friends to your database.



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Many times, it's as easy as saying "if you like this kind of thing, give me your phone number, address, email (however you like to invite), and I will add you to my list for the next one." Then you have contact information and the ability to build a relationship over time.

Here are just a few ideas for events that encourage invites:

1. Create a March Madness bracket and host a party for round 1
2. Start a Fantasy Football league and do a LIVE draft
3. Start a book club
4. Host poker parties
5. Host REGULAR Happy hours
6. Host BBQ's and encourage your friends to invite their family and friends
7. Invite people to tailgate parties
8. Rent out box seats at a game or concert (costs money, but people will show)

This is only a few ideas. You will have to get creative and figure out what works for you and your crew. Have fun with it and focus on creating events that are entertaining. Events that people will want to attend and invite friends to.

Meetups

Meetups are a great way to meet new people. There are thousands of them so don't feel like you have to pick one that doesn't resonate with you. Find a group that sounds like it would have "your people" in it and go, REGULARLY. Over time you will develop deeper relationships while doing things you enjoy. And the best part is, you don't have to be the creator! Let someone else organize the group. Just become an active/supportive member.



This isn't only true for Meetups but remember that consistency is key. You must become an active member for this to work. So, explore a bunch of groups and then pick the one or two groups you really enjoy, and double down on those.

Accept Invitations

As the catalysts for connecting, we should be extending more invitations than anyone in our sphere. However, we will still get invited to events, and it's imperative that we make it to as many as possible. Yes, this may even include 1-year-old birthday party with no alcohol!

Obviously, we can't make it all events, but the idea is that we say yes as much as possible. I have a group of teachers that I used to work with that get together once a quarter and I do whatever I can to make it to those events because I know it's a great way to keep those relationships alive. Simply be on the lookout for invites and...

Just say yes!

Ask For Referrals

This seems straight forward enough, but many people fail to do this, out of fear. Asking for referrals doesn't have to be weird or awkward, and if it is, then it's because you're either uncomfortable asking or your approach needs work. One of the main reasons I love referrals (outside of more business) is that I get to add new , awesome people to my sphere database. The best part is that they aren't just random people. They're people I already have a common connection with. This means we are much more likely to get along. This is one of the best ways to add people great people who will send you more referrals in the future.



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Although there are countless ways to ask for referrals, here are a few ways that I have used that are less invasive, but still effective:

1. Always ask for a referral when providing value, like when you send a CMA or when you give someone else a referral.

- “By the way, I know you may not be looking to move right now, but I am always looking for new people to serve, so if you happen to hear anyone talking about buying or selling, would you mind throwing my name out there?”

2. Ask your client right before closing

- Ask for their feedback and if they are happy with your service ask them to throw your name out there if they hear anyone mention moving. They will always say yes, and you will have planted a seed in the back of their mind.

3. When someone asks about your business, say, “it’s going great, but I could always be busier. If you happen to hear anyone talking about buying or selling, would you mind throwing my name out there?” When they say yes, you say “Thank you, I really appreciate you!”

Sidenote: If you sound overwhelmed or exhausted when someone asks about your business, they will assume you are too busy for referrals, and they WILL hesitate to send people your way.

4. Write it into your signature of your email.

- I am always looking to provide top shelf service to more people. If you know anyone looking to buy or sell, please let me know.
- Or... the best compliment I can receive is a referral from you.

5. Have your radar up. If you hear anyone talking about themselves or someone they know buying/selling, be confident and let them know you can help.



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Other Strategies to Add People to Your Database

As we dive into these next few topics, I want to point out that while these strategies will add people to our database, it's up to you to decide if this is the way you want to spend your time. Like I said before, I like to work with and attract people I know and like. That way I enjoy my work more because I have more control over who I work with. The next few strategies will build your database, but you will lose a little autonomy on who are connecting with.

With that said, if you don't like people you connect with, you can always remove them from your database, never to be seen again. On the flip side, if you do like them, then you add them to your sphere marketing campaign and move them from a C, to a B, to an A.

Networking

There are many forms of networking groups. Some groups have a lot of structure and rules. Some are designed specifically as lead generation groups and have expenses associated with them (BNI). Some are more informal and designed as a free space to get to know other professionals (ABNG or Realtor Associations). I'm not going to go into detail about all the different groups out there because they are always changing. You will have to do your own research and see what works for you.

What I will say is that I have gained some amazing friendships and business partners (incoming and outgoing) over my two-year commitment to networking. I really enjoyed getting to know other professionals and I would highly recommend this strategy as a fun way to get out there and meet new people. Plus, consistently attending groups allowed me to really dial in my elevator pitch.



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The key to networking is consistency. I went to a free group, but I went 2-3 times per week, and I always set 1 on 1's with new people at every meeting. Had I gone once a month it never would have worked. If you intend to leverage this strategy, then you must work it into your business plan and weekly schedule so you can make the most out of it. Also keep in mind, that you probably won't see results for at least 6 months, so be prepared to make at least a 12-month commitment.

Lastly, I like the free meetings that don't set limits on who can attend. I like them because not only is it free, but there was always a revolving door of new people for me to connect with. The reality is that most connections went nowhere, but there were quite a few that developed over time, including people who have become close friends.

Open Houses

The idea of an open house is to get potential buyer or seller contacts. I'm not going to go into strategies for effective open houses here, but what I will say is that just like networking, consistency is key. One open house does not make a career. If you take this on, take it on. Plan to do at least 1 or 2 per week for at least 6 months. That will give you the opportunity to learn what works and what doesn't. It will also give you some good data around whether it's working the way you want.

Just like with any of these strategies, the key is adding people to your sphere AND then connecting with them over the LONG TERM. If you churn and burn you will forever be generating new leads. If you stay in flow, then you can eventually step away from time consuming strategies like open houses and simply focus on nurturing referral sources.



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Door Knocking

This strategy takes a particular type of person. I door knocked for over a year and I learned a lot. At first, I thought I would hate it, but in a turn of fate, I actually realized I kind of enjoyed it. I was outside, meeting new people and walking around. The reason I got away from it is because it's time consuming, and it's only truly effective when combined with additional strategies.

Door knocking works best when you leave something behind (if they don't answer) and if you combine your efforts with a direct mail campaign. Both of these strategies cost money and time to create. That is why I believe this strategy should be left to the agents with deeper pockets. I ultimately stopped door knocking after a year of limited success and exceptional expense. However, I will say that I did create a relationship with one of my most productive referral partners through door knocking, but only because I stayed in flow over a period of time!

Cold Calls

If door knocking takes a special person, then cold calling takes an even specialer person. Some people enjoy cold calling, and some don't. If you do, then call away!

This is a great way to add new leads to your database, but my one struggle with cold calling is that we don't have control over who we connect with. However, you can always remove people if you don't like them.

Once again, the key to long term success with this strategy has less to do with your scripts or how many calls you make, and more to do with how well you stay in flow with the people you add to your database.



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Internet Leads

I can almost copy and paste this section from the cold calling or door knocking sections. Some people love this and do very well. The biggest caveat is that your success is all about your follow up and ability to develop relationships over time. The more people you nurture by adding them to your sphere marketing campaign, the faster you can get away from having to generate new leads every day.

Chapter 4 Summary:

When it comes to adding people to your database, there is no wrong way. Find what you enjoy and double down on that. Sports, meetups, networking, hosting events, open houses, door knocking, whatever. Just pick something and stick with it. Consistency is key when it comes to building out your sphere database.

Key takeaways:

1. There are a million different ways to build your database. Pick something and stick with it.
2. No matter how you met someone, keep them in your sphere marketing (if you like them) so you can nurture the relationship.
3. Some strategies provide more control over the type of people you meet, which will ultimately have an effect on the “feel” of your sphere database.



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Creating and growing a database is the obvious first step in successfully marketing to your sphere. However, a list is just a list unless you actually reach out to them in an organized, consistent manner. In this section we will talk about strategies to track and fine tune your list so you can EFFECTIVELY connect with your people in meaningful ways.

To CRM or Not to CRM?

There are many ways to track a database. While CRM's have lots of great tools, they can also over complicate a process that is fairly straight forward. Another way to track a database is through excel spreadsheets. Spreadsheets are much simpler, but their functionality is limited. So then, do you need a CRM?

Ultimately, that is a question you will need to answer. I know people who hate spreadsheets and need a CRM. I hate CRM's and only use spreadsheets. To a certain extent, it is personal preference. With that said, there are a few extra things to consider. If you are tracking many people who you don't know very well (cold call contacts, open house contacts, internet leads, etc), you will probably need a CRM, which will provide the necessary tools to effectively stay in flow with everyone. Additionally, if you are looking for specific tools like auto CMA's or other features, then a CRM may be the way to go.

I use spreadsheets because I love simplicity. On one page, I can easily see who I have talked to and when. I can see who I took to lunch and who I need to invite. I can see who I am avoiding and who frequently connect with. I like having all of that in one place on one page, with an easy-to-use interface, but once again, that's just me.



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Using A Spreadsheet

Because there are countless CRM systems out there, I am not going to explain how to use a CRM to track your database. Each CRM will have training to show you how to do that. However, I will take a moment to show you how I track my sphere database using a spreadsheet.

Once again, I like simplicity, and this is very simple. In the first column, I put their name. The second column is labeled 'relationship grade', the next 4 columns are labeled 'Q1', 'Q2', 'Q3', 'Q4'. Next is '1 to 1', and the last Column is for notes. It looks similar to this:

Name	Relationship Grade	Q1	Q2	Q3	Q4	1 to 1	Notes

As a reminder, the relationship grade is not meant to determine how much you like someone. The grade doesn't go up and down depending on whether they complimented your new hair cut or not. Rather, it's about your relationship status with that person. Refer to chapter 3 for details on ranking your relationships.

Ranking people in this fashion is not disrespectful. It is a quick and easy way to see who you can develop better relationships with. That's a good thing. In the end, the entire purpose of sphere marketing is about building better relationships with more people. It's about turning your C's to B's, and your B's to A's.



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Q1, Q2, Q3, and Q4 represent each quarter of the year. I make it a point to call every single person in my sphere once per quarter. However, if they are thinking about moving sometime in the next 12 months, I will call every 15-60 days depending on the situation and the person. More on that later.

When I call a person, I either mark an 'X', meaning I talked with them, or I put 'LM', meaning I left them a message and they didn't get back with me. My goal is to have 4 'X's for every person every year. That's the goal and of course that never happens 100%, because someone may not call me back, but that is the goal.

That may seem like a lot of calls to have to make each quarter, but let's break it down. If I have 150 people on my list and I need to call each person every quarter, then I have to call 150 people every 12 weeks. That is only 12-13 per week. I don't know about you, but depending on how much someone wants to talk, that may take 1-2 hours each week. That is definitely doable, even for a part timer. Ultimately, the goal should be to make anywhere from 25-40 calls per week. Of course, you may have to grow your database to do that (see previous sections).

Many times, I will end my conversations by inviting my friends and family to coffee, lunch, happy hour, dinner, golf or some other get together where the two of us get some one-on-one time. This is where the magic happens. This is where we learn more about them. This is where they learn about you and your business, and most importantly, this is where we strengthen our relationship. When I do a 1 on 1 meeting with someone, I put the date on the spreadsheet, so I know how long ago we connected in person.



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Removing People From Your Database

We have talked a lot about adding people to your database, but what about removing them. Yes, sometimes we should remove people. Remember, the idea is to work with people you like and people you connect with. A few times a year I will go through my list and look at every single contact (especially my 'C's) and make a decision about whether to keep or remove them.

Here are a few things to think about when making that decision.

1. Do you actually want to talk to them or is it more of a dread when you need to call?
2. Would you enjoy sitting down with them for a full 60 min lunch?
3. Have they called you back after you left them 3 or more voicemails or messages?
4. Would you enjoy working with this person if you were in a transaction together?

If you answered no to 1 or more of these questions, then you should consider removing them. If you answered no for 2 or more of these questions, then give em' the axe! They either aren't engaged, or you don't connect with them. You don't HAVE to remove them, but you should seriously consider it. I prefer to have a smaller list with people I love than a huge list with people I don't like. Therefore, I cut people when the time comes.

Spreadsheets Are Simple

That's it. Tracking a database using a spreadsheet is super simple! No bloated CRM required. This is the easiest way I have found to track a list of a few hundred people so I can make sure I effectively develop relationships, but once again, pic the interface that best suits you.



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Tracking CMA's In a Spreadsheet

I use a similar spreadsheet to track my annual CMA reports for my sphere. Each year I offer a CMA to as many people in my database as I can. The first year you do this, it will take more time because you have to get all the new information added to the spreadsheet, but then you don't have to do it again, so it gets easier over time.

Keep in mind that producing annual Market Analysis Reports is a great way to provide value to your sphere each year, but doing 100+ CMA's per year will also keep you informed about housing values, so you are always the market expert!

These are the headers for my CMA spreadsheet

1. Name
2. Date (date of last CMA, so I can filter and make sure I hit it every year)
3. Address
4. Lot size
5. Style (ranch, tri, 2 story)
6. Bed/bath
7. Year built
8. Garage (none, 1, 2, 3)
9. Above grade sqft
10. Below grade
11. Total sqft
12. Finished sqft
13. Condition (1-10)
14. Upgrades in the last 5 years
15. Notes
16. Value and notes on how I came to that value (I add a new column each year. That way I can track values over time. Don't delete old values or notes!)



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Like I said, this takes time up front, but I have had more buyers and sellers come directly from CMA conversations than any other strategy. Skip this at your own peril.

Business Tracker

Trying to keep everyone who may be thinking about buying or selling in your head is distracting and exhausting! It is much easier to get every potential lead into one place. That is where the business tracker comes in.

I originally saw this tracker when I went through Ninja Training. I have modified my slightly, but at the end of the day anyone can create this with a simple spread sheet. This sheet will have 5 categories, and just like your sphere calling list, the idea is to move people from “New” to “Closed”. Here are the 5 categories for your business tracker:

1. **New** - When making calls, or interacting with people, always be listening for tell-tale signs they may be moving. Family is growing, new job, raise, downsizing, etc. If they even hint that they may be looking to move anytime soon, add them to your new prospect list. Then increase your contacts for this person to every 15-60 days depending on the person and the situation.
2. **Warm** – These are people who are on the cusp of actually buying/selling. You have them on a search, and they are looking at it. You’re not looking at homes yet, but most of your conversations with them are dominated by real estate.
3. **Hot** – You have a buyer/seller agreement! You are actively showing homes, or you have an active listing.
4. **Under Contract** – Pretty obvious, right? This is when you get a contract accepted.



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5. **Closed** – Pay day! Make sure to track the following after close:

- Date
- Buy or Sell
- Closed Purchase Price
- Percent Commission
- Total Commission Amount
- Split Paid to Brokerage

Tracking these numbers will keep you on track and help you with business planning next year. Keep in mind that you can even add boxes in excel with simple equations that will total all your numbers for you.

You can also attach calculations to the New, Warm, Hot, and UC columns. This way you can track your level of production for the year, and you can also predict your potential production throughout as you move through the year.



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Chapter 5 Summary:

Tracking and fine tuning your database is absolutely critical to your businesses success. It doesn't matter what tools you use whether it's a CRM or spreadsheets. What matters most is that you have an organized plan to stay in flow with every person in your sphere. Find the way that works best for you and stick with it.

Key Takeaways:

1. Consistency is key!
2. Contact people in your sphere at least once a quarter and find multiple ways to connect.
3. Always look for new people to add and don't hesitate to remove someone you don't connect with.
4. Do an annual CMA (market analysis) for everyone and track them in a spreadsheet.
5. Use a system to track every person who mentions real estate from "New" to "Close."



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I have told people for years that the reason I was able to build a successful real estate business was because I do my job. I say that with a hint of sarcasm, but what I am really saying is that I take my job seriously. I take pride in knowing that I work hard to stay informed, to communicate well, and to make sure that my clients feel like they are being represented well. In the end, isn't that the entirety of what our job entails?

Providing top shelf service is about being a professional that people can trust so that your clients turn into raving fans. Doing your job and doing it with pride will ultimately increase your sales and referrals, which in turn increases your success. It's really not rocket science. Just find people who need to buy or sell, and then take exceptional care of them by doing your job in a professional manner. That's it! Seriously. Here's a few tips to help you do just that.

Stay informed

Our number 1 job as a Realtor is to be an advocate for our clients. We can only advocate if we know what's going on. That means we should be constantly sharpening our blade. If you aren't going to classes, reading articles, or doing something that hones your skills every week, then you are doing your clients a massive disservice. Ultimately, your lack of commitment to greatness will shine through and clients will "forget" to refer you.

Take your job seriously and become a resource for anything real estate. Stay up to date and either develop a deep understanding or have professional resources at your disposal by:

1. Cultivating up to date current trends knowledge. This includes residential, rental, mountain, and basic financial.
2. Understanding general lending guidelines.



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3. Creating and fine tuning a database full of qualified/professional contractors and resources for whom you can refer your clients to.
4. Seeking out and completing niche market certifications.
5. Developing an in-depth knowledge of ever-changing contracts.
6. Connecting with trusted mentors who can help answer tough questions and talk through challenging deals.
7. Developing relationships with appraisers and understanding the appraisal process.
8. Knowing general home values for key neighborhoods that you serve.
9. Participating in commission updates classes at the first of the year rather than the day they expire.

In the end, staying informed shows that you are dedicated to your profession. Your clients will appreciate it, they will refer you more, and they will take your advice when you give it, because they will trust that you have done your homework. If you are going to take the time to get your license and if you are going to take the responsibility to help your friends and family with their BIGGEST asset, then you MUST take your responsibility seriously and be the best you possibly can. Stay informed!

Sidenote: As a former middle school science teacher, in a school where many of my students' parents worked as engineers at Lockheed Martin, it was somewhat common for students to come to class with questions I didn't know the answer to. I was informed, but that doesn't mean I knew everything. Similarly, staying informed in real estate doesn't mean you know everything. If you don't know the answer to a question, just say so. Tell your client that you're not sure, but you will find out. They will appreciate your honesty and you won't get caught with your foot in your mouth.



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Put their interests above your own

Putting your clients interests above your own simply means that when you're advising them, advise them in their best interest, not your own. This doesn't mean you must roll over or become a doormat. No one respects a doormat, and it's likely they will take advantage of you or ask you to do unethical things. On top of that, they will likely "forget" to refer you to other people.

Therefore, you must be willing to hold your ground when you need to but remember that your clients' best interests come first. If your clients want to terminate a contract that you need to close, or if make a choice you disagree with (assuming it's not illegal), you are obligated to represent their best interests first. This can be hard sometimes, but in the end, that is what we were hired to do.

Of course, in order to represent your clients' best interests, it's important to seek to understand. When negotiating with your clients or for your clients, ask a lot of questions so you can understand what's important to them. Then leverage your expertise to present them with EVERY option you can think of. Once you have done that, you simply carry out their wishes to the best of your ability. Of course, this is assuming they are not asking you to do anything unethical or illegal.

Sidenote: Sometimes have to tell our clients things they don't want to hear. This may mean that telling them a hard truth is in their best interest. They may not want to hear what we have to say, but it's our responsibility to help them understand what they don't know. Putting their best interest first, does not mean rolling over.



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Putting our clients' best interests before our own is the ethical and respectable way to do business. Our friends and family not only deserve our honesty and respect, but they will trust us more, which WILL lead to more referrals to more great people.

Communicate, communicate, communicate

I still don't know how something so simple has become a lost art. I know that may sound harsh, but in my experience, people are thrilled when I do something as simple as communicating clearly, openly, and honestly. Most of our clients don't have an in-depth knowledge of the buying and selling process. They are leaning on us to not only advise them, but they also need us to keep them informed about next steps.

Typically, our clients want to be kept in the loop. They want direct answers and potential solutions so they can make informed decisions. This begins with communication. Know the situation, reach out to the necessary parties before things blow up, and leverage your expertise to communicate clearly and concisely... Frequently!

There is no over communication, and even if someone tells you to stop calling so much, I believe that's a more favorable conversation, then getting an earful for going MIA.

Want one (or 3) simple tool that will turn clients into raving fans who will send you referrals to other great people. Communicate, communicate, communicate!



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Chapter 6 Summary:

Providing top shelf service is about taking pride in our work. When we view ourselves as professionals and hold ourselves accountable to high level of service, we set ourselves apart from the competition and business will naturally flow our way.

Key takeaways:

1. Take pride in knowing your stuff. Put in the time and energy to learn useful skills, stay on top of current market trends, and understand contract lingo.
2. Be an advocate. Put your clients interests first.
3. Communicate. Be proactive. Don't wait for them to call you first.

CONCLUSION

I remember feeling frozen my first few years in real estate because I wasn't sure what "angle" to pursue. There are so many ways to build a business in real estate and it can be overwhelming. Sphere marketing is just one way of building a business, and it's not for everyone. I get it, but I will say this, if you don't have a follow up system that turns brand new leads (no matter where they came from) into lifelong referral partners then you will be forced to generate leads until the day you leave the business.

Generating leads is time consuming, costly, and exhausting! So, you have a choice, you can build a churn and burn business that requires constant lead generation, or you can build a powerful database where the leads can't be turned off.

Think about that. Imagine having a business where you stop calling internet leads, stop hosting open houses, and stop begging people to talk with you about real estate, and instead people reach out to you to talk about real estate. That's the sphere marketing difference.



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If you follow the principles in this handbook, your business will consistently grow year over year, plus if you ask me, it's more fun anyway. My business grew by 30-75% every year for 6 straight years using these strategies. In 2020, I closed 38 sides leveraging a database of fewer than 200 people.

I don't tell this story to brag. I tell this story because it exemplifies what is possible when we take care of our people. If we nurture our sphere and stay in flow with them, our business will grow. It is that simple.

I'll close with this...

Yes, sphere marketing is more like a freight train than a sports car. It takes time to get it rolling, but once it does get moving, the influx of referrals makes it nearly impossible to stop. Other forms of marketing will give you quicker results up front, which is a good thing (for a time), especially if you are a new agent. So, don't get me wrong, I'm not saying other forms of marketing are bad. Go after those sports cars, but eventually the time will come to trade your sports car in for a freight train. I know, I know, that's not sexy at all, but if that thought bothers you too much, then just know that once your business starts humming down the tracks like a freight train, you will have all the resources you need to go buy a sports car in the real world.

Here's to your journey in our world, my friend. I wish you the best of luck and prosperity as lovingly grow your sphere and crush your goals!



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