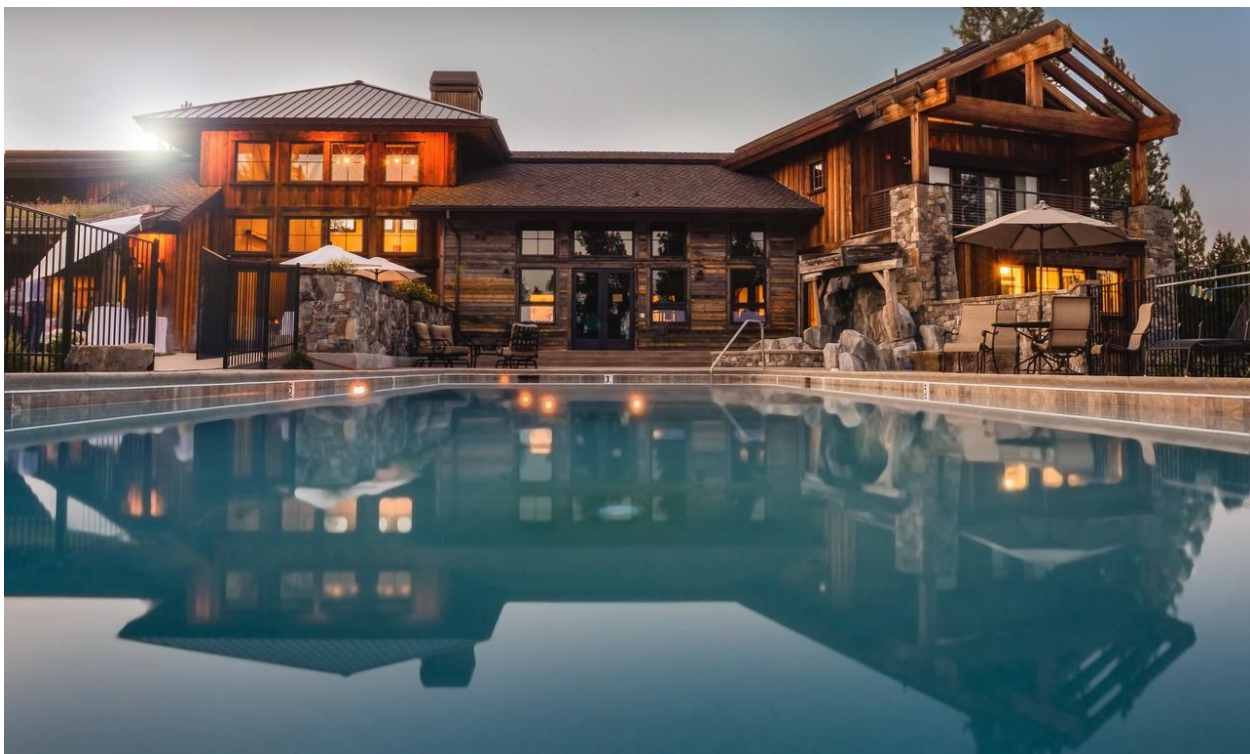




**MORTGAGE MASTERMIND**  
ELITE

## 10 Easy Steps to Secure Your Listing Agents

These relationships are critical to your performance and success.



**The Defining Difference**  
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## STEP #1: MAINTAIN CONSISTENT COMMUNICATION

When your pre-qual/pre-approval letter is issued, make it a practice to call the listing agent to introduce yourself and your company and to promote the strength of your borrower and why they should secure the purchase. This adds great value to your selling Realtor partners as well. Listing agents and their clients eagerly anticipate news from you, so it's important to keep the lines of communication open as this helps build trust and dependability.

## STEP #2: FOSTER A FAMILIAR WORKING RELATIONSHIP

Set up your contact info in your cell phone exactly as you want it shared with new referral partners. Text your contact info to the listing agent's cell right away, so they can save your contact info in their phone for easy access. Fostering a friendly and familiar working relationship with your listing agents is crucial to reaching new heights in your mortgage career.

## STEP #3: POST-OFFER FOLLOW-UP

Once the offer is accepted, send a personal handwritten note thanking the listing agent for the opportunity to support the financing of their sale, and include your business card for reference. If you focus on developing a strong connection from the start, you will stand out and set yourself apart from the competition.



## STEP #4: CREATE AN EXTRAORDINARY EXPERIENCE

Create the ultimate borrower and referral partner experience through thoughtful and consistent communication. Inform the listing agent via email, text or a live call that you will provide consistent weekly updates on the loan and at every milestone of the transactions (i.e., appraised value, loan submission, loan approval obtained, loan documents sent to closing, etc.). Maintaining consistent open communication and transparency with all parties will help you identify and address potential challenges in the transaction process in order to keep the loan on track.

## STEP #5: POST-LOAN CLOSING FOLLOW-UP

Upon loan closing, call the listing agent and congratulate them on the closing and share your appreciation for the opportunity to support the sale. With the countless local and national lenders available, it is important to continue nurturing the relationships with your listing agents and establish yourself as a valuable resource.





## STEP #6: THANK THE LISTING AGENT

Send a physical letter on your company letterhead to the listing agent thanking them for the opportunity to support the closed transaction at (*insert property address*) and for the opportunity to work with them. Make sure to let your listing agents know that you welcome the opportunity to support future transactions and help them educate their clients on the value of purchasing a home now.

## STEP #7: UPDATE YOUR DATABASE

Enter the listing agent in your Realtor database and contact the agent every other week by email, text and/or phone call and offer something of value (i.e., marketing tips, new product offerings, buyer referrals, etc.). Sharing your resources with your referral partners will help you stay top of mind and ahead of your competition.

## STEP #8: POST A 5-STAR REVIEW FOR YOUR LISTING AGENT

Research the listing agent's website to determine where they accept online reviews and write a 5-star review for the listing agent. Call or email the listing agent to let them know that you have given them a 5-star review for an outstanding job supporting the sale. If the agent does not use a review portal such as Yelp, Zillow or Google, let the listing agent know that you researched their website to leave a review and could not find a place to do so – suggest that they set up a review portal as you would like to write a 5-star review for them.

## STEP #9: SHARE YOUR UNIQUE MARKETING IDEAS

Offer a 30-minute marketing meeting to the listing agent to help identify how they are marketing their business currently and offer ideas and suggestions of how they could expand their marketing efforts to increase their closed transactions per year. Let your listing agents know that social media, for example, is a great tool to expand their reach in their marketplace. (Cindy's training program **Connection to Conversion Part 1 and 2** gives detailed direction on how to conduct the first and second meeting with new referral partners.)

## STEP #10: BECOME THE ULTIMATE "GO-TO" RESOURCE

Become the ultimate resource of value providing consistent communication through live calls, texts, emails and requested face-to-face meetings. Help your listing agents expand their influence in the marketplace and increase their production. Nothing builds loyalty faster than trust, open and honest communication and making people feel cared for and supported, while creating massive value that cannot be refuted. Be their trusted resource to bring them new and creative ideas to help them expand their own level of success and you will win their business for a lifetime.

