



## How to Execute a Top 5 Realtor Referral Plan



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### **Call or FaceTime 5 Realtors/ Referral Partners who appreciate and value your services currently:**

- Ask for their recommendation of 2 new potential referral partners who could benefit from your services.
- Use the script below when making the calls.

### **Summary Points:**

- Instead of a “cold call”, this generates a warm lead as they are now referred by a peer who gave them a recommendation as a great referral partner.
- The key is to follow up with the recommended names within 48 hours so the lead is fresh and relevant, and then follow back up with the referring Realtor to give them the update and share your appreciation.

### **Call Script #1 To Your Top 5 Realtors:**

*Hi Bob, this is Cindy Ertman. I wanted to reach out to you because we value you greatly as our trusted referral partner and appreciate our relationship with you more than you know. Our team is looking to expand our Realtor referral business this year. So, even though the refinance market has been strong year-to-date, we pride ourselves on helping our clients secure their dream of homeownership and would like to serve more buyers this year. We value our relationship with you and wondered if you could recommend a couple of quality Realtors who could benefit from the same kind of service that you’ve experienced in working with our team. We are not looking for quantity; we are looking for quality. We would greatly appreciate it if you could help us by recommending a couple of Realtors that might benefit from our services.*



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### **Call Script #2 To New Realtor Referrals:**

*Hi Lynne, this is Cindy Ertman. I just got off the phone with Bob Smith. Bob has been a valued referral partner of ours for many years and I had shared with Bob that we were looking to expand our Realtor partners this year, since our passion is helping buyers secure their dream of home ownership. I asked Bob who he trusts and values doing business with and who might benefit from the service we provide. He gave me your name as someone who he deeply respects, trusts and values. His recommendation holds a lot of weight with our team, so I wanted to reach out to you personally to see if we could connect for a virtual coffee appointment in the next week so I could learn more about you and your business?*

### **Overcoming the Objection Script: I Have a Trusted Relationship with a Lender**

*Lynne, I value long term trusted partnerships more than you know. And in my experience in our current lending environment, it's difficult to find one lender that can service all of your clients' mortgage needs. So, I'd still welcome a short appointment to meet you and have the opportunity to be your second-choice lender or be a secondary referral choice should your clients request more than one recommendation.*