



# Connection to Conversion in 3 Easy Steps

## The Fast Track to Building Meaningful Referral Partners



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It is no secret that relationship development and the way we connect with others has shifted dramatically. So, how do you go about quickly building beneficial relationships and developing the kind of partnerships that lead to trust and referrals? With advanced technology, video conferencing and social media, true interpersonal communication is lacking and yet our desire for real human connection and interaction is greater than ever.

If you take the time to embrace this strategy and practice the implementation effectively, you can truly change the course of your future referral partnerships and drive your results to new and exciting levels of success!

The initial meeting sets the tone for the relationship and can be the difference between a long, lucrative partnership and another missed opportunity. This powerful and proven **Connection to Conversion Guide** maps out three easy steps to build the solid foundation needed to create a successful, lifelong partnership with your referral partners and will help to create a real connection through asking compelling questions.

### STEP 1: GET TO KNOW YOUR POTENTIAL REFERRAL PARTNER

As a long-term mortgage banker and coach, I have learned that the art of creating authentic connections and cultivating mutual trust involves psychology, a communication mindset and relatability.

- **It's all about them:** This meeting is not about you or your products, service, pricing, programs or platforms. The first meeting is 100% about them.
- **Be Curious:** Show a true interest in learning more about your potential referral partner's business and life. This is not about you, your products, your service or your programs. Be open to learn about their business, their challenges, their fears, their goals, their wins and their visions for the future so you create a basis for a real relationship to bloom.
- **Be Free of Distractions, Fully Present and Focused:** It may sound simple, but it bears repeating. Be free of distractions, cell phones, laptops, etc. when meeting with potential referral partners so you can focus on them, the conversation and be fully present.
- **Eye Contact:** Many people are challenged to look directly into someone else's eyes. Eye contact is imperative to build trust, display confidence and needed to build connected partnerships.
- **Active Listening:** Really listen to understand. Do less talking and much more listening.

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## STEP 2: THE FIRST MEETING: THE QUESTIONS CREATE THE EXPERIENCE

### PART 1 – ASK POWERFUL BUSINESS QUESTIONS

### PART 2 – ASK POWERFUL PERSONAL QUESTIONS

- Refer to the lists of **‘20 Quality Questions to Ask to Learn About Their Business’** and **‘20 Quality Questions to Ask About Their Life Story’** at the end of this document.

#### **PART 1 – STARTING THE CONVERSATION: ASK POWERFUL BUSINESS QUESTIONS**

- Knowing the quality questions to ask to start a meaningful conversation and how to keep it on track when the focus begins to shift is key to its successful outcome.
- Practice asking ‘clarifying questions’ to drive below the surface to expand the conversation. Clarifying questions are asking the same question in a different way, such as, simply asking them to tell you more on the same subject. As an example, ask them to tell you more about how they developed their success as a Realtor. It’s asking the same question in a different way that encourages a deeper and more meaningful conversation.
- **20 Quality Questions to Ask to Learn About Their Business** will walk you through a sequential question sequence from the beginning of their career to present day. This order will help you guide the questions in a simple and conversational way. This is simply meant to be a guide and a reminder that this is not the time to talk about you. This is all about them.

#### **PART 2 – TRANSITION TO THEIR PERSONAL STORY: ASK POWERFUL PERSONAL QUESTIONS**

- **On this phase of the question process you will seek to genuinely learn more about their life story.** I recommend that the question sequence starts at the beginning of their life and flows through sequentially to current day. Remember to be a curious and compassionate listener.
- **By asking them about their personal life, they may share some deeply personal moments. Some may be very positive moments and some may bring up their most challenging moments.** Be prepared for the magical moments to appear!
- **Listen intently for the “aha” moments and acknowledge their relevance. Really listen with empathy and compassion.** I know first-hand that these are truly the magical moments when you create an environment that allows someone to really trust you and open up to you.

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- **20 Quality Questions to Ask About Their Life Story** will walk you through a sequential question sequence from the beginning of their career to present day. This exercise is meant to challenge you to get outside your comfort zone. You may not want to touch on painful parts of their life or ask questions that feel personal. However, it's an important element to building relationships based on trust and connection.

### STEP 3: SECURING THE 2<sup>nd</sup> MEETING and THE FOLLOW-UP PLAN

If you are meeting in person, it's always a good idea to take something to leave behind, such as a book, some marketing materials or info on your team. I usually give them a journal with my company logo on it.

I do not recommend that you talk about loans at the first meeting. However, if they ask about you and/or the company be sure to answer the question in a clear and concise way and just direct the next question back to them.

- **Thank Them:** They have just shared a part of their life with you- thank them for sharing their story.
- **The Hug or Genuine Handshake:** I am a hugger, so if I'm meeting them in person, I tell them that I am a hugger and I hug them. It doesn't matter if they are male or female, I strongly believe that hugs are an energetic exchange for building deeper relationships. If this does not feel appropriate for you, deliver a very genuine and appreciative handshake (if these actions are health appropriate).
- **Securing the 2<sup>nd</sup> Meeting: Marketing meetings are one of the best ways to build a mutually beneficial partnership.** I use this strategy to secure the 2<sup>nd</sup> meeting before I leave the 1<sup>st</sup>.
  - ✓ Set the intent to not leave the meeting without having the second meeting lined up on your calendars. I always use a 30-minute marketing meeting as my next step.
  - ✓ So, as we say goodbye, I say: *"By the way, I consider myself a self-proclaimed marketing specialist and it is one of my passions that I like to share with my referral partners. I love to help my referral partners come up with new ways to market and expand their business. So, if you'd like to set up a short 30-minute marketing meeting, I'd love to discuss your marketing plan and share some ideas on how you can build and expand your business over the next year."*

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- **Refer to the Connection to Conversion Part 2 training guide for detailed directions on how to conduct the follow-up meeting.** It's an opportunity for you to use your expertise to help them grow. We want to become valuable team members to our partners and that is what you are there to do...create a deeper relationship through the value you create.
- Share your special gifts that could help them expand their business. You can share your gifts of marketing, provide info on the financial markets, what's impacting the current Real Estate market, how to use social media to expand your business, how to use video to expand your influence, etc. Pay attention and offer suggestions.
- **The follow-up plan:**
  - ✓ **Text the potential referral partner your contact info to their cell phone upon departing the meeting and thank them.**
  - ✓ **Send a Handwritten Thank You Note:** Just keep it simple and thank them for sharing their story and let them know that you look forward to learning more.
  - ✓ **Enter the partner into your database and contact them through calls, texts or emails at least twice per month.** Consistent communication is required to continue to build a true relationship.

Note: This strategy works to develop and take any relationship to another level of connection. So, I encourage you to use this to further develop friendships, love relationships and other referral partnerships.

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## 20 Quality Questions to Ask to Learn About Their Business

1. How long have you been in the Real Estate industry?
2. What were you doing prior to selling Real Estate?
3. What made you decide to transition into Real Estate?
4. How difficult was it to get started and gain traction in the market?
5. What are your thoughts about the state of the current Real Estate market?
6. What do you love about selling Real Estate?
7. What are some of your greatest strengths as a Realtor or what do you think differentiates you in the market place. In other words, what is your special sauce?
8. What are you doing to market your business currently?
9. What are you finding that's working most effectively and what's not working currently?
10. Are there other things you want to do to market your business that you are not doing currently?
11. Do you currently use Social Media in a big way to market your business?
12. Are you using Video marketing currently to expand your influence in your marketplace?
13. What are some of your biggest challenges in the market currently?
14. What do you see for the future of Real Estate?
15. Do you have a team or anyone else supporting your business?
16. What goals do you have for your business over the next year?
17. How do you stay in touch with your past clients? Do you use a database management system?
18. How often do you stay in touch with your past clients?
19. Do you have a coach or anyone that advises you or helps hold you accountable to your goals?
20. What is your long-term plan for your business?

**WRAP UP PROFESSIONAL QUESTIONS** - Thank your new potential referral partner for sharing their professional story and let them know how much you appreciated learning about their business. Remember this is an organic process. These questions are designed to use as a guide, not a must ask.

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## 20 Quality Questions to Ask About Their Life Story

1. Were you born and raised here?
2. How many years have you lived here?
3. Do you still have family in your hometown?
4. Where did you go to school?
5. What was your major? Did you ever think you'd be selling Real Estate when you were young?
6. Are you married? If so, how long?
7. What does your spouse do for a living?
8. Do you have children? How old are they? (if kids are young, ask if they are in sports, where they go to school, etc. If their kids are grown and out of the house, ask where they live, what they do for a living, do they see them much, are any married? Grandkids?)
9. Did you raise your family here?
10. Are you an animal lover? Do you have any pets?
11. What do you like most about living here?
12. What do you like to do when you are not working? Do you have any special hobbies?
13. Do you travel much? Any favorite destinations?
14. What are your favorite local restaurants?
15. What makes you happy?
16. If money was no object, where would you be and what would you be doing?
17. What things do you truly value?
18. What are your greatest challenges?
19. If you had only one wish, what would it be?
20. What are some of the biggest wins you have had in your life? Or, what were your biggest challenges that you have had to overcome?

NOTE: This last question is a great opportunity to get them to open up to a whole new level. You can ask them clarifying questions such as "How did that win come about? You must have been working on that for years." Whether it's a sad moment or a triumphant moment it's important to drill down and ask, ask, ask.