

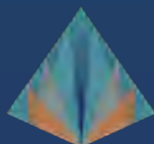
*Cindy Ertman's*



# 'NEW' REFERRAL

PARTNER PROGRAM

---



The Defining Difference  
BY CINDY ERTMAN

*Cindy Ertman's*  
**6-WEEK 'NEW' REFERRAL PARTNER PROGRAM**

*This 6-week 'New' Referral Partner Program provides you with my powerful step-by-step, turnkey system to build and grow your business referral partner relationships. I developed this program many years ago and have used it consistently to drive and grow my business. The key to its success is weekly consistency and a completion of the program.*

*—Cindy*

---

STEP-BY-STEP IMPLEMENTATION PROCESS	PAGE
WEEK 1	3
Handwritten Note Cards	
WEEK 2	4
Mail <i>How Successful People Think: Change Your Thinking, Change Your Life</i>	
WEEK 3	5
Shutterfly Photo Cards With Quote and Message On The Inside	
WEEK 4	8
Notepad With Company Logo	
WEEK 5	9
Email <i>Success Principles</i> from America's #1 Success Coach, Jack Canfield	
WEEK 6	10
Call Each 'New' Referral Partner To Schedule A 15 Minute Meeting and Share <i>50 Real Estate Marketing Ideas The Pros Use</i>	
Follow-Up Steps	11

The contents are for promotional and marketing assistance only and there are no assurances that implementation, utilization or use of any concepts, ideas or thoughts expressed or contained herein will result in the intended objective. You are advised to independently confirm with any internal or external compliance advisor that use of this information and materials comply with all necessary requirements prior to acting on this information and materials. Cindy Ertman and/or The Defining Difference is not acting as an advisor to you and does not owe you a fiduciary duty with respect to the information or contents of this written material. © Copyright 2021.

1. Select 20 potential referral partners that you want to target with your campaign. (Select Realtors, CPA's, Financial Planners or any good business referral source appropriate for your business and adjust the verbiage in the campaign appropriately.)
2. Build out your marketing database (see excel spreadsheet headers) with the following information for each potential referral partner.

NAME	TITLE	COMPANY	STREET	CITY	STATE	ZIP	PHONE	EMAIL

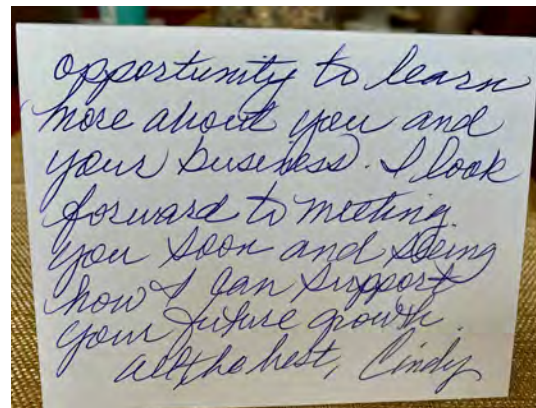
3. Order 20 company cards (approx. 4" x 6") with your business logo on the front or personalized note cards that are blank on the inside to prepare hand written notes.
4. On the 1st Friday (Week 1) of your campaign - write & mail handwritten notes to each of your 20 referral prospects. Include your business card inside.

Suggested verbiage for inside of card:

Dear <insert name>,

I want to congratulate you on your accomplishments and to let you know we have been paying attention to your success as a top Realtor in the local community. I am reaching out to introduce myself and would appreciate the opportunity to learn more about you and your business. I look forward to meeting you soon and seeing how I could help support your future growth.

All the Best,  
<Your signature>



The contents are for promotional and marketing assistance only and there are no assurances that implementation, utilization or use of any concepts, ideas or thoughts expressed or contained herein will result in the intended objective. You are advised to independently confirm with any internal or external compliance advisor that use of this information and materials comply with all necessary requirements prior to acting on this information and materials. Cindy Ertman and/or The Defining Difference is not acting as an advisor to you and does not owe you a fiduciary duty with respect to the information or contents of this written material. © Copyright 2021.

1. Use the text below and create a personalized letter on your company letterhead.
2. Purchase the book: "How Successful People Think: Change Your Thinking, Change Your Life" by John C. Maxwell. You can find the hardcover version on Amazon [here](#).
3. The 2nd Friday (Week 2) of your campaign mail out the letter along with the book in a 9" x 12" envelope to your 20 referral prospects. Include your business card.

Suggested verbiage for letter:

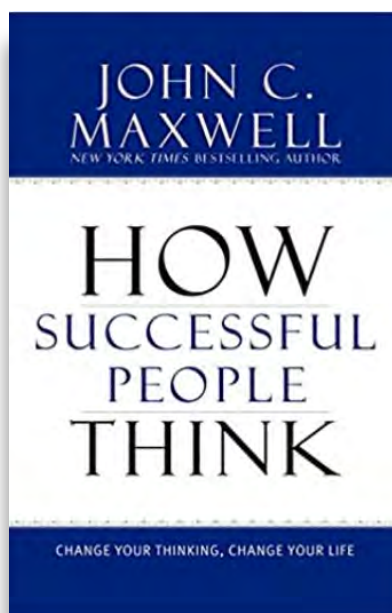
Dear <insert name here>,

I wanted to share this book with you that I have used personally to learn how to be more creative and when to question popular thinking. This compact read will help you tap into your creative potential, develop shared ideas, and derive lessons from the past to better understand the future. I hope you get as much value from the enclosed book 'How Successful People Think' as I did.

With these eleven keys to more effective thinking, you'll clearly see the path to personal success!

I look forward to the opportunity to support you and help you close more successful transactions.

To Your Success,  
<Your Name>  
<Name of Company>  
NMLS #



The contents are for promotional and marketing assistance only and there are no assurances that implementation, utilization or use of any concepts, ideas or thoughts expressed or contained herein will result in the intended objective. You are advised to independently confirm with any internal or external compliance advisor that use of this information and materials comply with all necessary requirements prior to acting on this information and materials. Cindy Ertman and/or The Defining Difference is not acting as an advisor to you and does not owe you a fiduciary duty with respect to the information or contents of this written material. © Copyright 2021.



1. Order Shutterfly photo cards or similar alternative with your team photo, a photo of your office, a family photo or a personal photo from your local region on the front of the card (see examples below.) I would recommend that you add a favorite quote to the inside upper half of the card and a personalized greeting per the examples below.
2. On the 3rd Friday (Week 3) of your campaign, mail out these cards to your 20 referral prospects.
3. Use the following recommended verbiage or your own personalized version for the inside of the note card:

Suggested verbiage for note card:

Dear <Name>,

We pride ourselves on relationship lending based on trust and high standards endorsed by our satisfied borrowers for over 20 years. I look forward to the opportunity to help you shine in the eyes of your clients and help you close more successful transactions.

To Your Success,

<Your Name>

<Name of Company>

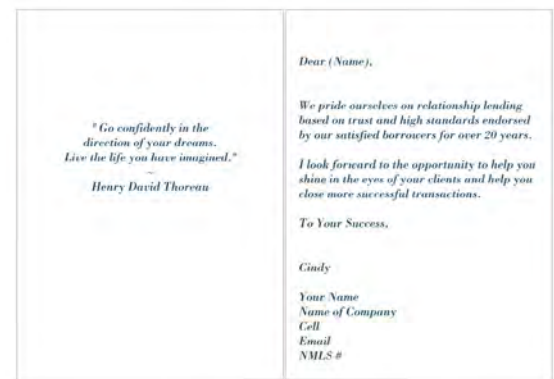
NMLS #

Suggested Quote for the Inside of the Card:

*"Go confidently in the direction of your dreams. Live the life you have imagined."*

– Henry David Thoreau

### SHUTTERFLY CARD EXAMPLES:



The contents are for promotional and marketing assistance only and there are no assurances that implementation, utilization or use of any concepts, ideas or thoughts expressed or contained herein will result in the intended objective. You are advised to independently confirm with any internal or external compliance advisor that use of this information and materials comply with all necessary requirements prior to acting on this information and materials. Cindy Ertman and/or The Defining Difference is not acting as an advisor to you and does not owe you a fiduciary duty with respect to the information or contents of this written material. © Copyright 2021.

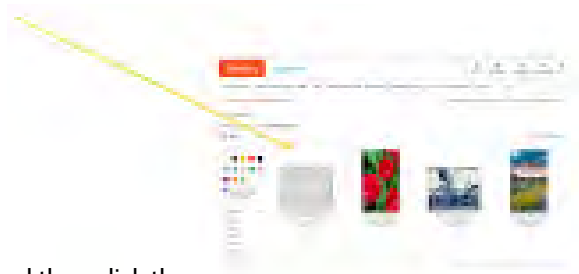




1. Go to [Shutterfly.com](https://www.shutterstock.com) for custom card template (you will be prompted to create an account later in order process)

2. Search for "5x7 folded card"

3. Click "Upload Your Own Design"

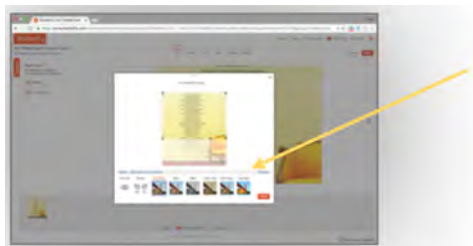


4. Select the quantity of cards you need then click the red "Personalize" button on the right side

5. Drag and drop or click the grey box to browse and select a photo for the cover of the card. (If you want to upload from your computer, it's easier to have the photo ready to go ~ resized and trimmed ~ and on your desktop)



6. Upload image



7. Double click on image to edit. You will be given the ability to rotate, change the color, and relocate or remove it and find another image.

8. Click red "Done" button

9. At the top of the screen, click "Bottom"

NOTE: The red "Next" button moves you to the other pages of the card too.

The contents are for promotional and marketing assistance only and there are no assurances that implementation, utilization or use of any concepts, ideas or thoughts expressed or contained herein will result in the intended objective. You are advised to independently confirm with any internal or external compliance advisor that use of this information and materials comply with all necessary requirements prior to acting on this information and materials. Cindy Ertman and/or The Defining Difference is not acting as an advisor to you and does not owe you a fiduciary duty with respect to the information or contents of this written material. © Copyright 2021.

10. Hover over the grey stripped box and you will see you can "Edit Text". Type or copy text into the box.



11. Choose font type, size (under format), and color. Select its placement location. (e.g. top, middle, bottom)



12. Click "Done"

• NOTE: You can add text to other areas of the card as well by clicking on "Top", "Back", etc. above the template.

13. Click "Next"

14. Choose the color of your envelope.

Note: addressing is only available with the white envelope.

15. Click "Next"



16. Choose between the three options on the left-hand side.

- Delivery Suggestion: Have all cards mailed to your address so that you can give them a final proof before sending, plus this method allows you the opportunity to add a personal touch by addressing the envelopes yourself.
- If you decide to have them addressed directly on Shutterfly, you must have an account and import your addresses to the address book.

17. Click red "Add to Cart"

• The site will prompt you to review any issues they find, or just click "Ignore"

18. At this point, if you haven't created an account, you will be prompted to Sign-in. You must create an account to proceed.

19. Go to Cart

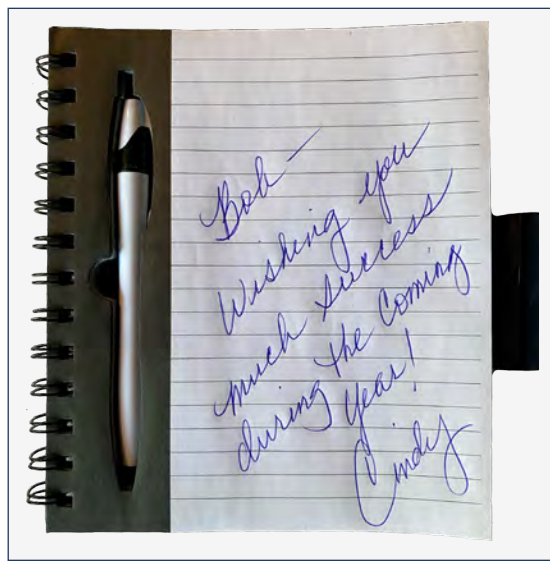
20. Check out

21. Success!

The contents are for promotional and marketing assistance only and there are no assurances that implementation, utilization or use of any concepts, ideas or thoughts expressed or contained herein will result in the intended objective. You are advised to independently confirm with any internal or external compliance advisor that use of this information and materials comply with all necessary requirements prior to acting on this information and materials. Cindy Ertman and/or The Defining Difference is not acting as an advisor to you and does not owe you a fiduciary duty with respect to the information or contents of this written material. © Copyright 2021.



1. Order small notepads (approx. 5" x 7") with your company logo or similar company promotional item and add a short personal note on the first page (see example.)
2. On the 4th Friday (week 4) of the campaign, mail out the notebooks to your 20 referral prospects.



The contents are for promotional and marketing assistance only and there are no assurances that implementation, utilization or use of any concepts, ideas or thoughts expressed or contained herein will result in the intended objective. You are advised to independently confirm with any internal or external compliance advisor that use of this information and materials comply with all necessary requirements prior to acting on this information and materials. Cindy Ertman and/or The Defining Difference is not acting as an advisor to you and does not owe you a fiduciary duty with respect to the information or contents of this written material. © Copyright 2021.





1. On the 5th Friday (Week 5) of the campaign send the email below to help to educate your 20 Referral Prospects on how to take their business to the next level with strategies from master Success Coach, Jack Canfield.

**NOTE:** Be sure to cut and paste the text below (exactly as it is) and paste into your email.

---

Subject Line: I thought you would find this valuable...

Dear <First Name>,

I wanted to share something with you that I thought you would find valuable... it is a complimentary VIP 10-day online course with the world-famous success expert, Jack Canfield.

You may know Jack as the creator of the inspirational Chicken Soup for the Soul book series and co-author of the bestselling book, *The Success Principles*, which teaches 64 powerful success concepts and techniques and has been hailed as the "bible" of personal development and success.

Here's the link to the complimentary program that you can start at any time...  
*Success Principles 10-Day Transformation* at <http://jackcanfield.com/transformation/>.

Here's is an example of a few of Jack's most popular Success Principles...

1. Take 100% Responsibility for Your Success - Take 100% responsibility for everything in your life - the level of your achievements, the results you produce, the quality of your relationships, the state of your health and physical fitness, your income, your debts, your feelings—everything! Give up all your victim stories, all the reasons why you can't and why you haven't up until now, and all your blaming on outside circumstances and choose to act "as if" you are 100% responsible for everything that does or doesn't happen to you.
2. E+R=O (Events + Responses = Outcome) - The basic idea is that every outcome you experience in life (whether it's success or failure, wealth or poverty, wellness or illness, joy or frustration) is the result of how you have responded to an earlier event in your life. Likewise, if you want to change the results you get in the future, you must change how you respond to events in your life ... starting today. Most people find excuses and blame others when things don't work out the way they want. Jack teaches us how to change our responses (R) to the events (E) until we get the outcomes (O) we want.
3. Ask, Ask, Ask - Asking for what we want is one of the most reliable, easy and predictable ways to get more of what we want. Asking is one of the most powerful success principles, yet it's a challenge that holds many of us back. Don't assume that you are going to get a no. Take the risk to ask for whatever you need and want. If someone says no, you are no worse off than when you started. If someone says yes, you are a lot better off. I sincerely hope that you enjoy this information and find it as valuable as I did!

I look forward to the opportunity to support you and help you close more successful transactions in the future!

To Your Success,  
<Your Name>  
<Name of Company>  
NMLS #

The contents are for promotional and marketing assistance only and there are no assurances that implementation, utilization or use of any concepts, ideas or thoughts expressed or contained herein will result in the intended objective. You are advised to independently confirm with any internal or external compliance advisor that use of this information and materials comply with all necessary requirements prior to acting on this information and materials. Cindy Ertman and/or The Defining Difference is not acting as an advisor to you and does not owe you a fiduciary duty with respect to the information or contents of this written material. © Copyright 2021.





1. Print the attached PDF *50 Real Estate Marketing Ideas The Pros Use* and put it in a company folder or binder to use to review with your new referral partner at your meeting.
2. Call all 20 'new' referral partners to get a 15-minute meeting to review these top marketing strategies. Remember, the purpose of this meeting, it to get face to face. Ask questions and listen...
3. Pick 3 top strategies to review with each Realtor.
4. Meet with each agent and keep the meeting to 15 minutes or ask if they are okay on time if you continue.
5. Show respect for their time, listen attentively and log all of their answers.
6. Ask 3 questions to start off the meeting.
  1. What are you doing currently to market your business?
  2. Are you using a database management system currently to market to your past clients and prospects and if so what are you using?
  3. Are there any areas that you'd like to improve on to more effectively market your business?
7. When you get back to the office, send them this link to the 50 Marketing Ideas Guide  
<https://thedefiningdifference.com/wp-content/uploads/2021/02/50-Ideas-PDF.pdf>  
– but not until after you meet with them live and make them aware they are a VIP prospect for you and you take their relationship very seriously.

The contents are for promotional and marketing assistance only and there are no assurances that implementation, utilization or use of any concepts, ideas or thoughts expressed or contained herein will result in the intended objective. You are advised to independently confirm with any internal or external compliance advisor that use of this information and materials comply with all necessary requirements prior to acting on this information and materials. Cindy Ertman and/or The Defining Difference is not acting as an advisor to you and does not owe you a fiduciary duty with respect to the information or contents of this written material. © Copyright 2021.

## FOLLOW-UP STEPS



### *Congratulations On Completing The 6 Week 'New' Referral Partner Program!*

*We hope you had great success and formed the beginning of  
some valuable relationships with new referral partners.*

Here are some follow-up steps to continue to grow and nurture your new relationships:

1. Text each referral partner your contact info so they have your contact information in their cell phone.
2. Add each referral partner into your on-going database marketing campaign so they get regular communication from you.
3. We suggest you prepare another handwritten note card for the partners you met or spoke with to thank them for their time and the opportunity to connect.
4. Relationships need to be nurtured. As we water our garden to help our plants grow, we must also consistently and thoughtfully nurture our relationships and provide them value.
5. As you receive new referrals from your new partners, remember the importance of providing the best customer experience to build and maintain life relationships with your new referral partners and your new clients.
6. Congratulations and we wish you much success as you continue to build and grow your business. We'd love to hear your success stories. Email them to [Info@CindyErtman.com](mailto:Info@CindyErtman.com).

To Your Success,

*Cindy Ertman*

The contents are for promotional and marketing assistance only and there are no assurances that implementation, utilization or use of any concepts, ideas or thoughts expressed or contained herein will result in the intended objective. You are advised to independently confirm with any internal or external compliance advisor that use of this information and materials comply with all necessary requirements prior to acting on this information and materials. Cindy Ertman and/or The Defining Difference is not acting as an advisor to you and does not owe you a fiduciary duty with respect to the information or contents of this written material. © Copyright 2021.