



The Ultimate Follow Up Campaign to Build Trusted Realtor Relationships



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Forging close professional relationships with real estate agents is one of the most valuable things you can do for your lending career. Having an effective marketing plan that contains a powerful follow up campaign is essential to remaining top of mind and earning new business. The key to building lasting, trusted relationships is to provide excellent service, give value up front and plant referral seeds along the way.

The 12-Step Realtor Follow Up Campaign:

- 1. Text the Realtor your contact info.** Send your vCard so it's easy for the Realtor to save it directly to their phone.
- 2. Enter the Realtor into your Database.** If possible, create a separate database just for Realtors so you can target them with custom email campaigns.
- 3. Connect with the Realtor on all social channels** and be sure to comment, like and engage with them daily.
- 4. Send a handwritten note card** thanking them for their time and expressing your excitement to work together.
- 5. Email the Realtor 2x per month** sharing industry news, market updates, rate updates, and marketing ideas. Share value consistently.
- 6. Schedule a follow up meeting** to discuss market trends and what they are doing to market their business (use Cindy's Connection to Conversion Part 2).
- 7. Invite the Realtor to monthly educational events you lead**, including masterminds and lunch and learns.

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The 12-Step Realtor Follow Up Campaign (Continued):

8. **Share success stories or testimonials** from your clients or referral partners, who have benefited from working with you.
9. **Share training videos and tips via social media** so they better understand the mortgage process and the pain points that you solve.
10. **Send occasional gifts and tokens of appreciation** such as coffee giftcards, books or journals to show gratitude for the opportunity to build a relationship with them.
11. **Ask for feedback about what they need** and how you can best provide value to them and their business.
12. **Stay in regular and consistent communication** through phone, text, email and in-person meetings for collaboration and to share ideas.