



CREATING A FOLLOW UP PLAN FOR YOUR SPHERE OF INFLUENCE

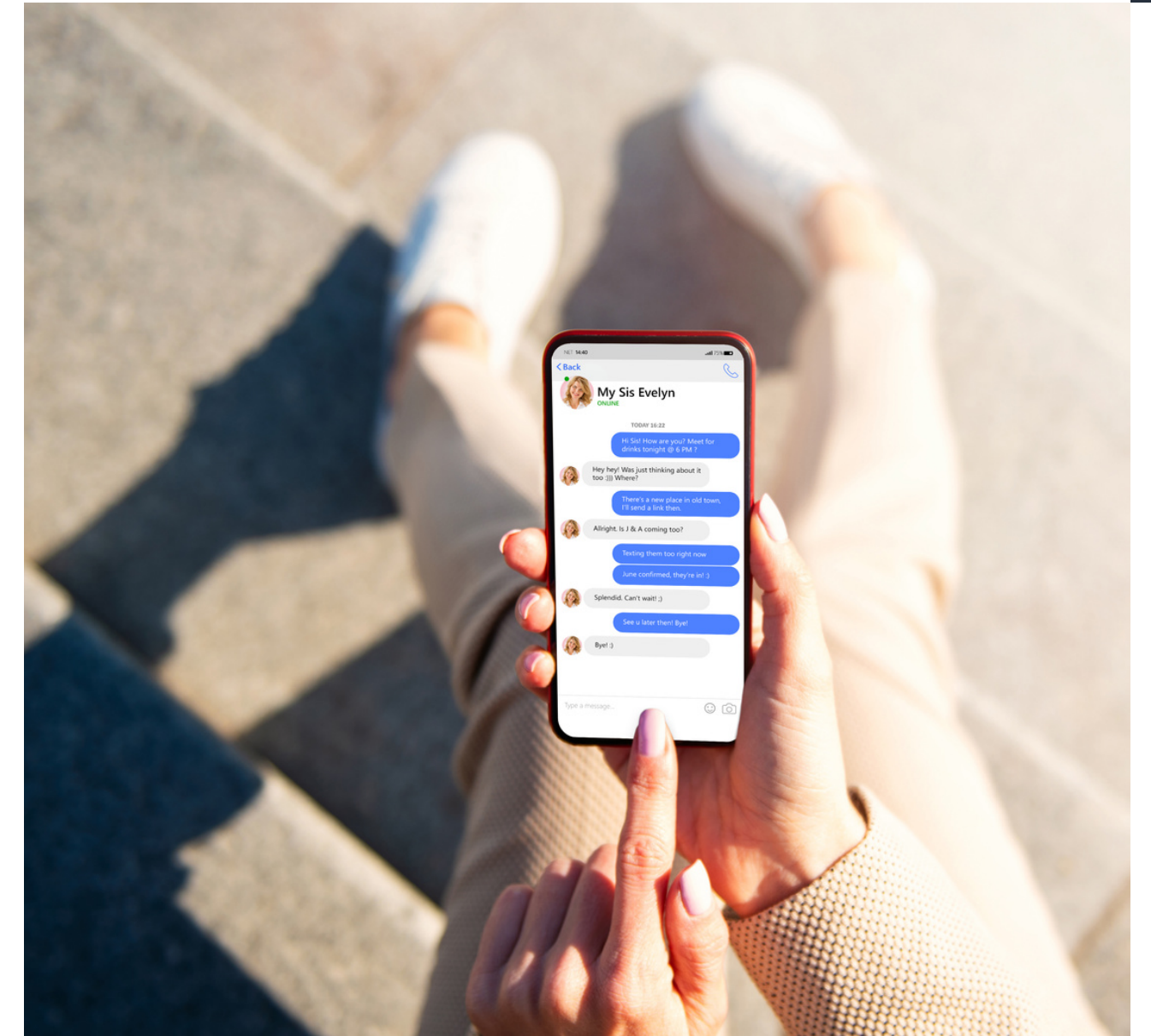
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WHAT IS YOUR SPHERE OF INFLUENCE?

A group of people you have some influence on because they know you.

- Family
- Friends
- Previous/current colleagues
- Former classmates
- Church/organization/activity mates, etc.



**YOUR BUSINESS
LIFELINE!**

WHO TO INCLUDE

- Family
- Extended Family
- Friends
- Your neighbors or HOA members
- Your Parents' Friends
- Former Classmates
- Former Sports Teammates
- Current Teammates or Activity Partners
- Current Co-workers
- Past Co-workers
- Church Members
- Organization or Club Members
- Beauty providers (your hairdresser, manicurist, etc.)
- Your health care providers (doctor, dentist, optometrist, etc.)
- Other providers (auto repair go-to person, accountant, dog groomer, etc.)
- Spouse contacts (friends, co-workers, extended family etc.)
- Children's contacts (PTA, coaches, teachers, etc.)





COMPILING YOUR DATABASE

Find an excel template on the Silvercreek Toolbox --> 100 Day
Action Plan --> Week 1, Day 1

Compile contact information for as many people in your
sphere as possible:

- Name
- Email
- Phone Number
- Address
- Birthday
- Notes
- Occupation / Business
- Category



FINDING INFORMATION

IN YOUR CONTACTS

Check your phone and email contacts for phone numbers and email addresses

PUBLIC RECORDS

Check your local assessor website for addresses; Check business/workplace websites; whitepages.com for some addresses (free & paid options)

SOCIAL MEDIA

Helpful for locating birthdays and some contact info. Also a platform for direct contact

PERSONAL OUTREACH

Consider reaching out to contacts and asking if you can add them to a list for occasional real estate market updates

GROWING YOUR SPHERE

HOBBY GROUPS

Join a meet up with others that have similar interests

NETWORKING EVENTS / GROUPS

Attend networking events consistently to build relationships

VOLUNTEERISM

Volunteer with your favorite non-profit, school, or local organization

HOST NEIGHBORHOOD & CLIENT EVENTS

Neighborhood events can bring people to you (food truck rally, pumpkin giveaway, yard sales, etc.)

INTENTIONALLY &
CONSISTENTLY MEET PEOPLE
TO GROW YOUR SPHERE



CONTINUE TO GROW YOUR SPHERE



ENGAGE

Participate in groups (church, hobbies, children's school/sports, etc.) and/or volunteer. Meet and talk to people and don't be a secret agent!



CONNECT

Connect with EVERYONE you meet on social media - your free, ongoing networking group

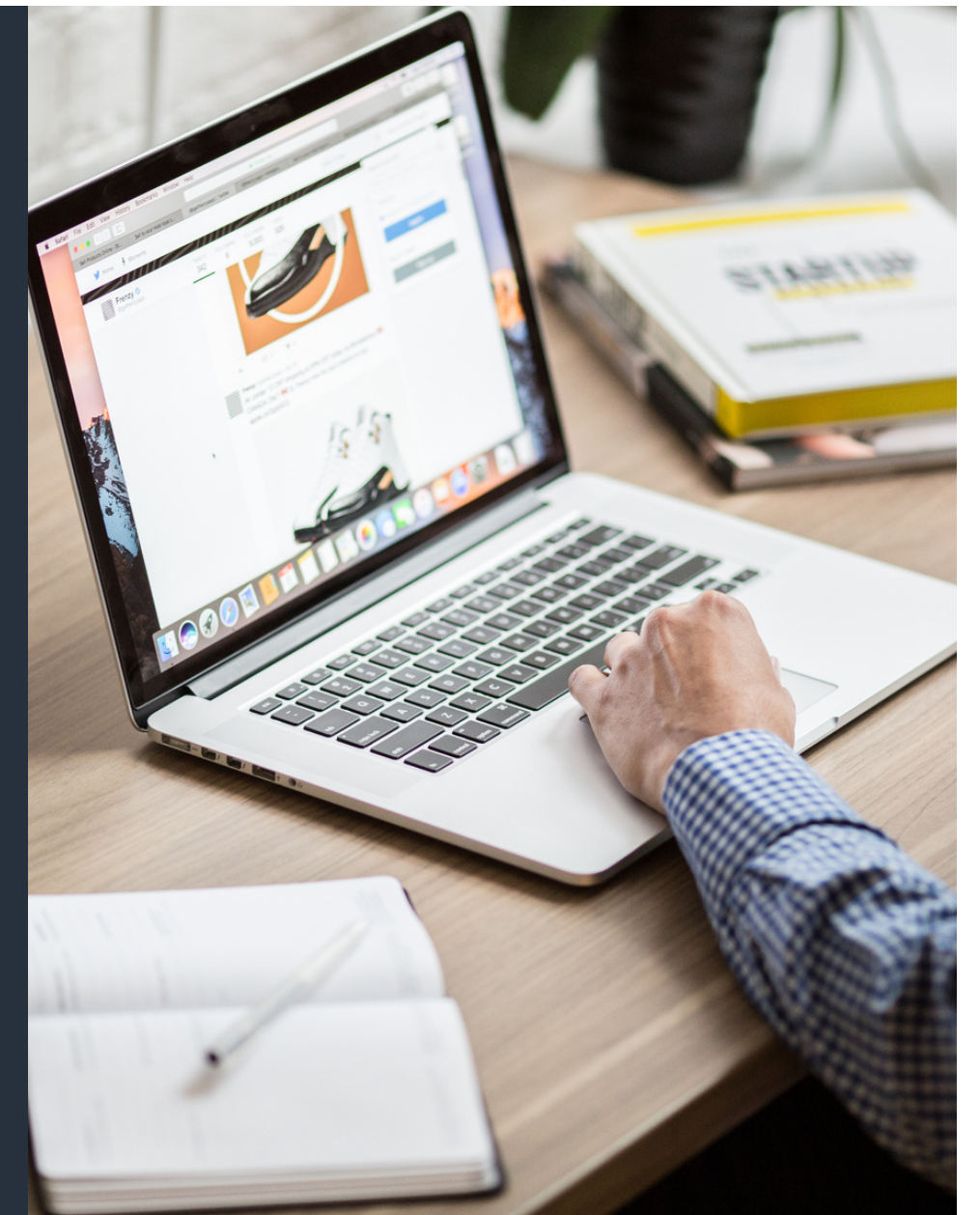


ADD TO CRM

All contacts should be added to your CRM with follow up plans

BOOMTOWN / CRM PIPELINE CATEGORIZATION

- NEW: Just registered, no contact
- HOT: Ready to buy 3 months or less
- NURTURE: In contact buying in 3 -6 months
- QUALIFY: Attempted to contact, no contact
- WATCH: Spoken with but are 6+ months
- PEND: Under Contract
- CLOSE: Database who get marketed (all past contacts, sphere of Influence)
- ARCHIVE: Opted out, contacted with valid info but do not want further contact (do not get any marketing)
- TRASH: No phone, no email



CATEGORIZE / TAG YOUR CONTACTS



A+ = People who have sent you multiple referrals

A = People most likely to refer you

B = People who would refer you, if asked and shown how

C = People who might refer you in the future

D = People to be deleted from your database



FOLLOW UP FREQUENCY

Will vary based on category:

Weekly?

Monthly?

Every Other Month?

Quarterly?

Semi-Annually?

Annually?

WAYS TO STAY IN TOUCH

DIGITAL

- Email newsletter
- Social media (comment on posts, shout outs, etc.)
- Host online giveaway
- Text message to check in
- Text message to share market update
- Personal videos in text messages
- Social media giveaways
- Recommend their business

PRINT

- Card in the mail (birthday, sympathy, etc.)
- Postcard mailers (seasonal, monthly coupons, etc.)
- Mail newsletter
- Mail gift for special occasion (wedding, baby, etc.)
- Annual CMA
- Mail annual sports card, calendars, etc.

FACE-TO-FACE

- Pop By's
- Meet for Lunch / Coffee
- Phone Call
- Holiday gift / pie delivery
- Holiday children's gift drop off (activities, toys, etc.)
- Host client appreciation event, service projects, educational events

IMPLEMENT YOUR PLAN

01 ORGANIZE

02 SCHEDULE

03 ACT



FOLLOW UP PLANNING

	A+	A	B	C
FOLLOW UP FREQUENCY				
FOLLOW UP METHODS				

TOOLS FOR ORGANIZATION & AUTOMATION

CRM

- Organize contacts
- Set up auto email drip campaigns
- Automate reminders for action

CALENDAR

- Set reminders for planning client events, seasonal pop-bys, etc.

ACCOUNTABILITY

- Consider an accountability partner or mastermind group to help you stay accountable to your goals





KEYS FOR FOLLOW UP & ENGAGEMENT:

- Be genuine
- Be authentic
- Be kind
- Be helpful



QUESTIONS?



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