

Lenders

What to do & When to do it With each part of your business

Monday

Real Estate Agent

Calls

1. List of 40 (Qualify)
2. Call all 40 on Monday
3. Birthday program
 - Cards
 - Food
 - Gifts
4. Categorize as
 - A, B, or C (A's = 4+ units per year)
5. Happy hour monthly
6. Lunch and Learn monthly
7. Book Club

Tuesday

Status Updates

1. Buyer
2. Buyer's agent
3. Seller's agent
4. Title/Escrow
 - a. Ask for referrals
 - b. Ask for the business
 - c. Request meeting with Seller's agent at close of escrow
5. Gift at closing for all

Wednesday

Pre-apps

1. Call
2. Email
3. Send video
4. Update file every 60 days
5. Ask for the business

Thursday

Top 50 Past Clients 400 Past Client Database

1. **50 favorite past clients**
 - a. Call 12 per week
 - b. Birthday program
 - c. Invite to monthly happy hour and annual client appreciation event
 - d. Monthly LOTH
2. **400 past clients database**
 - a. Call 1 letter per week= 2 touches per year
 - b. Birthday program
 - c. Invite to annual client appreciation event
 - d. Monthly LOTH

Friday

Top 50 VIPs (favorite people)

1. Create list of the most influential people in your life (family, friends, business people, etc)
2. If you don't have 50, start with 25. Add people you are targeting once you are in relationship with them.
3. Call 12 per week
4. Meet 8 per month
5. Add to database
6. Send video LOTH
7. Birthday program
8. Ask for the business

Builders

1. Call 10 every Friday
2. Stop by 2 per week
3. Join builders association and take to monthly lunch