



## Partnership Planning & 6 Weekly Questions to Generate More Referrals

### Partnership Planning is Game Changing

#### Length of Relationship:

0-3 Months

4-6 Months

7+ Months

#### Frequency of Meetings

Weekly–15 minutes–Phone\*

Bi-Weekly–30-45 minutes–Face-to-face

Monthly–45-60 minutes–Face-to-face

The goal of every meeting is to discuss:

- ▶ **Efficiency** – What can we do better together?
- ▶ **Productivity** – What can we do to generate more business?
- ▶ **New Needs** – Is there anything I should be doing to better serve you?

#### \*For explosive results, add the weekly six magic lead generation questions:

1. Who have you met in the last 7 days who you would like to sell real estate to or for and you are not sure they are going to use you?
2. Who do you plan on showing property to in the next 7 days who I should speak with to make sure we optimize their purchasing power?

*(In both of the above questions: Make the outbound call, cross-sell the Agent and schedule a pre-application conversation.)*

3. What are your open house plans for the next 2-4 weeks that I can help you create a success strategy for?
4. What Buyers have you closed in the last 30-60 days for whom you have not hosted a house warming party?
5. What Agents trust you who aren't having a great lender experience who I could contact using your referral?
6. (Optional for Renovation Opportunities) Do you have any listings that are not moving as fast as you would like? Why?