

Meeting 1

Proposed Meeting Outline

Meeting 1— ASAP

Meeting 2— Between 3-7 days from meeting 1

Meeting 3— TBD

Meeting 4— Should be 30 days after meeting 3

Meeting 5— Should be 30 days after meeting 4

Give Value Before Seeking Something of Value!

Meeting 1: Talk—Listen

- I appreciate you meeting with me, it has been a while.
- What have you been up to? (Listen) or -- Who is your team?
- What is going on in “Lenders Space”, good or bad. (listen for needs)
- Do you guys have a Lender? If yes — How is it going? If yes - How many referrals did he/she give you last year?
- I am looking to start working with a few new agents that have the same values as I do and understand our value of service.
- You know I will close on time and have a smooth transaction.
- But this year I want to increase my service levels by:
 - ⇒ Helping you sell your listings quicker
 - ⇒ Commit to sending referrals back to you, I am competitive, I need a goal.
 - ⇒ Do you see this as valuable? (listen)
- Ed forwarded me a couple articles on NAR. It showed that 42% of a realtors business is from PC’s and Referrals. I know I can help.
- Kathy — Did you know 2 of your listing qualify for our no money down products?
 - ⇒ 1420 Bean Oller, Delaware
 - ⇒ 132 Sims Rd, Pataskala
 - ⇒ Review our blue 100% financing signs and...
- Both — Doctor’s program, 5% down all gift and Non Warrantable program.
- Last year, what was your typical customer like— their financing needs?

I would like to work with you and expand our referrals back and forth. I can only do this with about 10 agents. How I plan on doing it will take about 30-45 minutes. So I would like to put a plan together to show you how I will obtain referrals and how we might work together this year. Does next Tuesday or Thursday work for you?

Give Value Before Seeking Something of Value!

20 Minute Meeting Outline

Listen 70%
Talk 30%

I appreciate you meeting with me, it has been a while.

What have you been up to? (Listen) or - Who is your team. What is going on in "Lenders Space," good or bad. (listen for needs)

Do you guys have a Lender? If yes – How is it going? If yes – How many referrals did he/she give you last year?

I am looking to start working with a few new agents that have the same values as I do and understand our value of service.

You know I will close on time and have a smooth transaction.

But this year I want to increase my service levels by:

- Helping you sell your listings quicker.
- Commit to sending referrals back to you, I am competitive, I need a goal

Do you see this as valuable? (listen)

Kathy - Did you know 2 of your listings qualify for our no money down products:

- 1420 Bean Oller, Delaware

- 132 Sims Rd, Pataskala

Review our blue 100% financing signs and...

- 
- Prepared
 - Expanded Pool
 - Help Sell Faster

Both – Doctor's program, 5% down all gift and Non Warrantable program

Last year, what was your typical customer like – their financing needs?

I would like to work with you and expand our referrals back and forth. I can only do this with a select few. So I would like to put a plan together to show you how I will obtain referrals and how we might work together this year. How does next Tuesday or Thursday sound? (stop talking)

Give Value Before Seeking Something of Value!

5 Good Questions to Ask

5 questions: Be relevant (likability plus adding value) Talk 30% & listen 70% of the time.

1. Where are you having your most success in your business?
 2. Where are you having the most pain in your business today?
 3. What are the top 3 things you need from a lender?
 4. With your current lending relationship what could be better?
 5. If I can show you how to earn more referrals by working with me and my system to earn an extra 2 more closings per year- would that interest you?
- What is the purpose of asking these questions?

Give Value Before Seeking Something of Value!