

## A La Carte Value Menu for Agents - 12 Week Follow-Up Plan

Step 1 of Thors Hammer – have coffee or lunch. This can be face to face or virtual. If virtual appointments, offer to have coffee or lunch delivered or send a gift card to the coffee shop for them to pick up their favorite.

1. Handwritten thank you note after the first meeting.
2. Book a second face to face meeting to teach them how to market to their database.
3. Send the PowerPoint slides to the agent regarding how to market to their database for reference.
4. Book a third meeting to share with them the advantages of HomeBot – you can then utilize their new database list from the prior meeting.
5. From your FROG session, send a Mr. Schmooze gift that shows you listened and know what is important to them.
6. Reviews – show them the importance of getting reviews and how to get started.
7. Realtor First Aid Kit – fun gift to drop off or send.
8. Slybroadcast – show them how to use this tool – demo by sending them a message via the service.
9. Send a book on a specific topic that will help that agent with their goals.
10. BombBomb video of a mortgage tip of the week.
11. Teach your agents how to use BombBomb videos. Explain the importance of creating Milestone and current timeframe videos they can send to their clients.
12. Car Wash coupon(s).
13. Pizza party via Zoom meeting – send out their favorite pizza for the family prior to start of meeting. Lead the discussion mastermind group of agents after the introductions of families.
14. Reach out to ask who the coolest agent they know is and would they mind giving an introduction – “who should I meet?”
15. Networking happy hour.
16. Wine tasting event.
17. Ice cream social.
18. Dinner with agent and their spouse – bring your spouse or date if applicable.
19. Refer to the Bakers Dozen Classes for agents on FC website from Nashville live event – 13 classes you may use – try one a month as a one on one or for a mastermind group.
20. Client/Real Estate Agent appreciation events.
21. PowerPoint presentation on what sets you apart from other lenders aka cool things you do to help them with their business – do as a Face to Face in office to introduce to team or can do via Zoom if team is remote.
22. Take old Zillow leads and put into a follow drip campaign via Agent Legend or Connect My Leads – return viable buyers to the agent.
23. Create a mastermind group of agents that meets weekly or monthly.
24. Create flyers for open house.
25. Create classes on products or topics to educate agents.
26. Axe of Freedom for agents – can send task list of all agent’s duties and how to delegate to a team.
27. Realtor Report Card – they grade themselves in areas they need assistance and growth – they also state # of buyer side and listing transactions per year. This can be used at training classes to get guests to tell you their production or as a tool when offering to help them as a mentor.
28. Send the agent the Loan Product Cheat Sheet.
29. Training for team of agents in broker offices.
30. Outdoor outlining with agents - golfing, mountain biking, hiking, yoga, horseback riding. This could be your Friday fun activity and have different guests each week or schedule periodically – monthly, quarterly.
31. MBS Highway – great sources for weekly tips and updates – send in written or video format.
32. Share with agent’s the idea to market to engaged or newly married couples.
33. Share with agent’s the idea to follow up 60 days after clients moved into the home – “How are you settling into your home? How was the move?”
34. Create auto reminder to let agent know that tomorrow or next week is our mutual client’s birthday.
35. List Reports – allows for creating marketing materials to give to the agent to use on a listed property.
36. If the agent does not have a CRM, you can offer to co-brand with the agent through your CRM. For example, this can be done with Total Expert.

37. Create a FSBO relationship to help be the liaison and introduce the seller to your top agents to gain listings.
38. Empty box campaign – Give the agent 3 boxes they can give to their clients to begin their declutter process for listing or begin packing to buy and move into a new dream home.
39. Invest in a high end 3-D camera for professional photos. Establish a relationship with a photographer to take the home photos and then drop them into a branded listing presentation for the agent and loan officer. The agent would pay the fee for the photographer, the LO supplies the equipment and branded marketing template.
40. Host a cocktail party or gathering at the local high end car dealership like Bentley or Rolls Royce.
41. Host a drive-in movie night in your community and ask agent to co-sponsor.
42. Escape room evening with agents.
43. Axe throwing outing with group of agents.
44. Bowling parties with agents.
45. Community curb appeal care project - identify homeowners who need a little extra help through local civic organizations or churches and host a workday inviting realtors to join and give back to community.
46. Figure out what is going on in your community this weekend and call or text agents and ask them if they are going.
47. Ice cream truck to go to brokers office - sponsor for a couple of hours and let agents invite their past clients.
48. Facebook stalking and follow up with handwritten card and/or phone call when something happens in the agent's life.
49. Use every mode of communication ... call, text, email, snail mail, gifts, Facebook message, Instagram, linked in, etc. and change it up!!!
50. Call on Mondays and ask if they had an open house over the weekend. Send over the sign in sheet and you will send thank you notes on behalf of the agent and get them preapproved for the agent.
51. Create accountability sessions over zoom - smile and dial. Agent calls their database while you call yours.
52. Help your agents hire help. Take our templates and adjust for a real estate agent. Introduce them to WizeHire, the WH team members can help edit the ad for the agents.
53. Have your team help you train up the agent's new hires. Great for your marketing
54. Mary Carroll did a class right around when the pandemic hit. There is a version for LOs and a version for Agents just below it:

**What To Tell Your Agents: A Real Estate Agent Survival Guide**

<https://mortgagemarketinganimals.com/course/what-to-tell-your-agents-a-real-estate-agent-survival-guide/>

**55. Agent Mastermind**

(LOs can send the replay link & password for their agents access to the last 8 classes, they can send an individual link, or host a lunch and learn for agents in person)

<https://mortgagemarketinganimals.com/agent-mastermind/>

56. Here is an agent database class under the **Agent Mastermind** section:

**Farming Your Database (for Agents)**

<https://mortgagemarketinganimals.com/course/farming-your-database-for-agents/>

57. Here is another database class within AMM:

**1-3 Referrals Per Month From Your Database**

<https://mortgagemarketinganimals.com/course/1-3-referrals-per-month-from-your-database/>

58. **Agent Mastermind** Invitations – send weekly. These are classes to help agents grow their business.

59. Text – top four topics from past **AMM classes**. See which they would like further information.

60. Utilize **Agent Mastermind** past classes for areas an agent shares they are struggling or desire to grow. Look up the topic, email the link and follow up.