



The “If, If, When” Strategy to Get a Prospective Referral Partner to a Yes



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How to Cold Call a Realtor to Get the First Meeting Script

Hi {Realtor’s Name},

This is {Your Name} with {Company Name} in {City} and I’m reaching out to you today because I’ve been following your success in our local market for some time. I know what kind of determined hard work and focus it takes to create the reputation and success you’ve created in the marketplace and I know because I put that same type of determined effort and dedication into running my mortgage business. I also believe that talented leaders need to know each other, even if we don’t work together. I’ve got some unique strategies we are utilizing to help our agents get their offers accepted and we have some unique marketing strategies that are helping our Realtor partners be more successful in their business. I’d welcome the opportunity to grab coffee with you to share what I have to offer and to learn more about you and your business. Would you be open to a 30-minute coffee meeting next week?

How to Get a Potential Realtor Partner to a YES in working with you at the First Meeting

The best way to engage with a potential Realtor partner is to ask quality questions such as:

- 1.** How long have you been in the Real Estate business?
- 2.** What are some of the challenges you are facing in the market right now?
- 3.** What are you doing to market your business in this current market?
- 4.** Are you active on social media and if so, what platforms are you getting the most engagement from?
- 5.** Where are you getting the most traction from your marketing efforts?
- 6.** Where do most of your referrals come from?
- 7.** Are you using a CRM to stay in touch with past clients?
- 8.** What are some of the goals you have for your business over the next year?
- 9.** What are your biggest concerns or challenges with the loan process that you have experienced?
- 10.** What is most important to you in your relationship with your lender?



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During the meeting, integrate throughout the meeting (at 3 different times) the “IF, IF, WHEN” Strategy:

IF we have the opportunity to work together {Realtor’s Name}, one of the things I love sharing with our new Realtor partners is our 10 Point Milestone Communication Plan. Our Realtor partners love it because they never have to call us to check the status of the loan. We contact all parties to the transaction 10 different times and every Tuesday during the process, so you are always up to date on the status of the loan and can rest assured that the loan is staying on track to close on time.

IF we have the opportunity to work on a transaction together {Realtor’s Name}, I’d love to show you our tracking system for how we track the loan to make sure we are staying on track to close on time.

WHEN we have the opportunity to work together {Realtor’s Name}, I’d love to share our follow up campaign that we integrate with your clients for the life of their loan, so we stay in touch with your client, follow up on any major life changes, educate them on the market ahead and make sure to keep you updated with any information we learn about your client that may be helpful for you, should they decide to make any future house changes.

These 3 suggestions are what The Ertman Team used to get a Realtor to lean in to a YES to work with our team. You can follow the IF and WHEN sentences with any special strengths that you and your team offer to your Referral partners. Maybe you carefully track the financial markets and you are a master at educating your clients on the current market, or maybe you are a guideline expert and you absolutely know what loan products your clients need to choose to be able to find mortgage solutions for challenged loan scenarios. Or maybe you have 100% close rate, as we did, and you vet the loan very carefully on the front end, so the Realtor and clients do not have any surprises along the way.

Whatever your secret sauce, integrate it into the “IF, IF, WHEN” Strategy to get your new potential Realtor Referral Partner to lean in more quickly to a YES to work with you!