

# WORKING THE FUNDAMENTALS DIALOGUES

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## **HOW TO USE THIS RESOURCE**

When you work by referral, your relationships are the foundation of your business. It's important to lay the groundwork for building strong relationships every time you communicate with your past, potential and current customers.

Whether you're new to the business or are a seasoned pro, these dialogues are meant to help you communicate with your customers, explain how you work and ask for referrals. Although you may repeat these dialogues verbatim at first, over time you'll become confident enough to put your own spin on them. You may even find yourself repeating them automatically.

### **3 Tips for getting the most out of the dialogues**

- 1 Practice.**  
Remember the idiom, "practice makes perfect?" The more you practice, the easier the words will be to say. Practice whenever you have a chance—in the morning while you're getting ready, in the car on the way to an appointment or during lunch.
- 2 Write them down.**  
Sometimes it's easier to memorize the dialogues if you write them down. The process of writing each word will help commit it to memory. Write the dialogues on index cards or in a notebook.
- 3 Keep them handy.**  
Put these dialogues where you can easily access them, whether it's on your phone, printed out and placed on your desk or on index cards you keep in your car (or in all three places). Having them in several locations will help you remember to practice them.



WORKING THE  
FUNDAMENTALS  
DIALOGUES  
**THE BASICS**

## THE BASICS

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# THE REFERRAL DIALOGUE

### **Educate your clients as to how your industry works**

“Most people spend the majority of their time and resources prospecting for new business— things like: cold calling, door knocking, advertising, direct mail, etc...”

### **Articulate how you work**

“I devote myself to serving the needs of my clients before, during, and after each transaction. All I ask is that while I’m working for you, I would like you to refer me to people of comparable quality to yourself, who are thinking of the type of service I provide, and who would appreciate this same level of attention...”

### **Outline the benefits to your clients**

“You see, as long as you and my other clients keep referring me, I don’t have to go out prospecting like everyone else, and I can do an even better job working for you. Does that make sense?”

## THE BASICS

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# THE MAYOR CAMPAIGN DIALOGUE

**Use this dialogue to add new people to your database or to prioritize those you already have.**

“Oh, by the way®... if you were buying or selling a home, or had a friend or family member who was, do you have a real estate agent you would refer them to?”

**If their response is “yes, I have someone I refer,” then your reply is:**

<Agent>

“That’s great. It’s important that you have a qualified professional to work with.”

*\*The point is, you now know not to invest your time.*

**If their response is “no, I don’t have anyone,” then your reply is:**

<Agent>

“Well, I’d like to be that person... Every month I send out valuable real estate or customer information that my clients find helpful. Would you like to receive that?”

<Client>

“Sure.”

<Agent>

“Okay great, where’s the best place to send it?”

<Client>

“Probably my home address.”

<Agent>

“Okay, and your address is?”

<Client>

“1234 Main Street.”

<Agent>

“Okay, great. Now if something came up, and I needed to get a hold of you, what’s the best number to reach you?”

<Client>

“555-1212”

<Agent>

“Great. I am looking forward to staying in touch with you, and if you know of anyone who is thinking about buying or selling a home, just give me a call with their name and number and I’ll be happy to follow-up and provide them excellent service.”

## THE BASICS

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# THE MAYOR CAMPAIGN DIALOGUE

### **Alternate dialogue for people you know well:**

“Oh, by the way... if you were buying or selling a home, or had a friend or family member who was, am I the agent estate agent you would refer them to?”

### **For those who say, “Yes, I will refer you”**

- a.** Add them to your Client Appreciation Program™ and mail them this month’s Item of Value, if you haven’t already.
- b.** Follow up with a personal note. Keep it simple: “Great talking with you! Thank you for your confidence in me.”

### **For those who say, “No.”**

It’s time to delete them from your database. Now you know who to spend your time with.

## THE BASICS

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# 4 EASY WAYS TO ASK FOR A REFERRAL DIALOGUE

1. “Oh, by the way, if you know of someone who would appreciate the level of service I provide, please call me with their name and business number. I’ll be happy to follow up and take great care of them.”
2. “Could you do me a favor? If you hear of anyone who is interested in buying or selling a home, can you keep me in mind?”
3. “I’ve really enjoyed talking with you today. If any of your friends or family express an interest in buying or selling a home, it would be an honor to work with them. Just give me a call and I’ll be happy to follow up.”
4. Remember to let your clients know you’re open and willing to take great care of their referrals! “Oh, by the way... I’m never too busy for your referrals.”



## THE BASICS

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# THE BIG 3 AND MODIFIED BIG 3 DIALOGUES

### For past clients you've done a transaction with

Referrals don't always surface immediately after the sale is closed. A great way to remind past clients to send you referrals is to simply pick up the phone and call them. The dialogue below will help you navigate that call and ensure that you stay top-of-mind.

#### 1. Can I be of any help?

"Hi Molly, this is \_\_\_\_\_ calling. How are you?"

"How is your family [...business, chit chat, etc.]?"

"Molly, the reason I'm calling is that I just wanted you to know that if I can ever be of help to you, please don't hesitate to call.

#### 2. The value you represent to me

"I want to make sure you know how much I value you as a client. It was a pleasure for me to serve you, and I look forward to serving you again in the future."

"My business is built by working with people like yourself and taking care of you, your family, friends and associates..."

"Also keep in mind if you ever need a referral to a good trade or service professional, I come across some really good people from time to time..."

#### 3. Oh, by the way...

"Oh, by the way...Molly, if you know of someone who is looking for the personal attention that I provide and is thinking about buying or selling a home, I'd love to help them. So when you come across these people, just give me a call with their name and business number and I'll be happy to follow up and take care of them for you. Does that sound good to you?"

## THE BASICS

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# THE BIG 3 AND MODIFIED BIG 3 DIALOGUES

(CONTINUED)

### **For clients you have not done a transaction with**

It's likely there are contacts in your database you have not done a transaction with yet, but who would make great clients once the time is right. If you've mailed marketing flyers to these potential clients, it is perfectly acceptable to call and check-in to see if you can be of any help. Here are a few ways to start that conversation:

#### **1. Can I be of any help?**

"Hi Jody, this is \_\_\_\_\_ calling. How are you doing?"

"How's the family [...business, chit chat, etc.]?"

"Jody, the reason I'm calling is because I want to know if you received the information I sent you this month on \_\_\_\_\_. I hope it was helpful to you."

"Also, keep in mind if you need a referral to a good trade or service professional, I come across some really good people from time to time..."

#### **2. The value you represent to me**

"Jody, I just want to make sure you know how much I value our relationship, and I want to build my business by working with great people like you."

#### **3. Oh, by the way...**

"Oh, by the way...Jody, if you know of someone who is looking to buy or sell a home, I'd love to help them. So when you come across these people, just give me a call with their name and business number and I'll be happy to follow up and take care of them for you."

"Does that sound good to you? ...Okay great, Jody, I'll be in touch. Take care."

## THE BASICS

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# REFERRAL AGENT SAMPLE DIALOGUES

### 1. Team Leader Dialogue

*When talking to the referring client:*

“Hi [John], this is [Brian Buffini] calling and I just wanted to thank you for the referral to [Bob Smith]. We’ve already set up an appointment to meet him and you can be sure we’ll take great care of him for you. In fact, I have expanded my business and brought in a buyer’s specialist so now we have someone totally devoted to helping people just like [Bob].”

### 2. The Assistant’s Dialogue

*When talking to the new incoming referral:*

“Hi [Bob], this is [Becky with Brian Buffini]’s office. Your friend [John] asked us to call you and said you were thinking about buying a home.”

[Wait for response] “I will have our buyer’s specialist [Fred Scott] call you to set up a time to get together and talk about your real estate needs. What days or times are best for you?”

[Wait for response] “I’ll have [Fred] call and let you know which of those times he can fit into his schedule. We look forward to working with you.”

### 3. Team Member Dialogue

“Hi [Bob], this is [Fred Scott] calling from the [Buffini] Real Estate Team. [Brian] asked me to follow-up with you and set up a time to get together so we can talk about your specific real estate needs.”

- When handing off a lead to another agent, the most important thing to communicate to the agent is the lifetime value of that client.
- The second most important concept to communicate is the vital need for feedback on what has transpired with the lead to date.
- The third point is that because most of your clients come to you by way of referral, their expectation will be that any lead they send to you will be handled by you or someone on your team. So when the agent calls any new lead, they must communicate that they are part of your team (even if they are an independent agent on their own right).



**WORKING THE  
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CONTACT**

## CONTACT

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# INTRODUCTION PHONE CALL DIALOGUES

**For your first follow-up call after sending the Item of Value to the people in your database, use the Introduction Call Dialogue.**

“Hey, [John], this is [Lisa] calling. Is this a good time for you? How’s the [family, business, etc.]? I’m checking in to see if you received the letter I sent about [my decision to join (name of company) or the unveiling of my new Client Appreciation Program for my clients, family and friends]. As I mentioned in the letter, the thing I’m most excited about is doing business by referral. Well, you may not know this, but most real estate agents spend as much as 85% of their time and money prospecting for new clients by cold calling and advertising. Well, [John], my commitment is to build relationships with people who know and trust me, and who will refer me to their friends and family; people like you. My plan is to pour 100% of my efforts into working for my clients. You’ll see what I mean as time goes on. As part of my Client Appreciation Program, every month I’ll send you information I believe you will find valuable.”

### **Qualifying Dialogue for your Database**

“Oh, by the way... if you decided to [sell or refinance] your home, or had a friend or family member who wanted to buy or [sell or refinance] a home, do you have a [real estate or lending] professional you would refer them to?”

## CONTACT

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# OUTGOING CALL VOICEMAIL DIALOGUE

### **After sending an Item of Value**

“Hi [Brian], sorry I missed you. I’m just calling to check in with you and see how you’re doing. I hope you received the information I mailed to you on [topic of Item of Value sent] and found it useful. If you’d like more information or I can help you in any way, just give me a call.

And if you know someone who’s thinking about buying or selling a home, I’d love to help them. Just let me know. Thanks!”

## CONTACT

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# INVITATION TO LUNCH DIALOGUES

### Sample 1:

“Hi [Mary]. This is [Joanne Durso]. It’s been ages! I was just thinking of you and thought I’d give you a jingle to see if I could take you to lunch on [Monday] so we can catch up. Would that work for you?”

### Sample 2:

“Hi [Mary], [Joanne Durso] here. Hey, was just thinking about you the other day and wanted to know if you want to go grab a bite to eat next week? [Monday] or [Friday] looks good to me.”

### Sample 3:

“Hey [Mary], [Joanne Durso]. It’s been a long time since we’ve gotten to see each other. I’m wondering when’s the soonest I could take you out to lunch?”

### Sample 4:

“Hey [Mary], it’s [Joanne Durso]. How are you doing? It’s been such a long time since I’ve gotten to talk with you. [personal chit chat, e.g., How is Sarah doing in her soccer league?] What would it take for me to get some time to go take you out to lunch?”

### Sample 5:

“Hi [Mary], [Joanne Durso] here. Hey, I was just thinking about you the other day and wanted to know which day next week would be a good time to take you out to lunch.”

## CONTACT

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# THE NEW AGENT DIALOGUE

### **“How long have you been in real estate?”**

“You know what? I’m really new to the business, and I have a lot of energy. I’m fired up, I’m enthusiastic, and I have time available for you. If we encounter a problem that I don’t know the answer to, I’m one phone call away from people in my office who have hundreds of years of experience. And I’ll get you all the answers you need.”



# CALLING BUSINESS OWNERS DIALOGUES

## Creating an Online Business Directory

Give your clients and their friends and family a reason to come to your website. When you list businesses they can trust because you have used them or checked them out and can put your name to them, you will have people coming to your website and calling you as their trusted advisor. It also creates a mechanism for you to network with other business owners so you can help each other grow your businesses by referring each other.

### Online Business Directory Dialogue

“I have an opportunity you may want to take advantage of.

Because of the nature of my business and the depth of the relationships I have with my clients, I refer people to businesses like yours on a regular basis. In order to make it hassle-free for my clients, I’m creating a direct-access online Business Directory of select local businesses I trust.

The Business Directory includes attorneys, financial planners, loan officers, hair salons, pizza parlors, painters, roofers and babysitters just to name a few.

There is NO COST for you to have this type of exposure to my clients. My only request is that you do an excellent job like you always do.

Would you like to be included in the Directory?”

[If yes.]

“Okay great. I’ll be sure to add you to my Directory. And, remember, I also appreciate referrals and I’m never too busy to take great care of yours.”

## CONTACT

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# CALLING BUSINESS OWNERS DIALOGUES

## Alternative dialogue when calling business owners—if not doing Business Directory

Call 10 business owners you have a good relationship with (you refer them, they refer you, those that you use) and talk with them about running your business by referral. You can share with them the Items of Value you send out every month. At the very least, share the Gentlest of Reminders Dialogue (“Oh, by the way...I’m never too busy for your referrals.”)

“As business owners, one thing we have in common is the need to continually generate leads. In my experience, the best type of client to work with is a referred client because they come in with a level of trust in me and knowledge of the kind of service I’ll provide. I’m in a coaching program where I’m learning how to generate more referred leads. My goal is to seek out like-minded business owners who are committed to delivering excellent service, who I can refer my clients to, and create win-win relationships with—where we both benefit from referred business. Do you want to get together and see how we can help each other?”

**NOTE:** Even if you’re new to Working by Referral, you can have great interactions with other business owners because you have something they will recognize as very valuable once you share it with them.



**WORKING THE  
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**CARE**

# POP-BY DIALOGUES

- **Set-Up Dialogue**

“I’m going to be in your area tomorrow between 2:00 and 3:00; I’d love to Pop-By and see how you’re doing.”

- **During Pop-By**

Use “The Referral Dialogue” or “The Big 3” dialogue

- **Leaving Dialogue**

“Oh, by the way... I’m never too busy for any of your referrals.”



WORKING THE  
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**COMMUNITY**

## COMMUNITY

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# BUSINESS OWNER POP-BY DIALOGUES

“Hi, Nancy. I wanted to let you know I just finished my marketing plan for the year and you’re going to be one of the businesses I feature.”

[If you already have a date] “In fact, I’m going to feature you in March.”

“What I’m going to need from you is a 1-page description of your business, what you do, etc., because I want my clients to know more about you. If you choose, you can also provide me with an introductory coupon I can use and send to my top 100 advocates.

I’ll be reminding you when we get closer to the date, but I just wanted you to know that I value you and the quality of business you’ve provided for me and my clients in the past, and I want to make sure that I can help you get more of your ideal clients.

### **Before you leave:**

“Oh, by the way®...don’t forget I also like to work with referred clients and I’m never too busy to take care of your referrals.”

**The next time that business owner encounters someone who is in need of your services, who do you think will come to mind? Who ELSE is offering to feature them and their business?**

## COMMUNITY

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# BUSINESS BITES WITH BUSINESS OWNERS DIALOGUES

**<Agent>**

“As business owners, one thing we have in common is the need to continually generate leads.”

**<Business Owner>**

“That’s true...”

**<Agent>**

“While advertising and direct mail have brought me some leads, they’re pretty expensive, and creating ad pieces can be time consuming.”

**<Business Owner>**

“I spent a lot on advertising last year...”

**<Agent>**

“In my experience, the best type of client to work with is a referred client because they come in with a level of trust in me and knowledge of the kind of service I’ll provide.”

**<Business Owner>**

“Hmm...”

**<Agent>**

[Articulate how you work]

“Like I mentioned on the phone, I’m learning how to generate more referred leads. As part of the way I plan on doing business from here forward, I’ll be sending out Items of Value every month to people like you. Here is an example.”

[Show one of your favorite Items of Value.]

“My goal is to seek out like-minded business owners who are committed to delivering excellent service that I can refer my clients to. I also want to create win-win relationships where we both benefit from referred business.”

[Outline the benefits to them]

“The benefits to you, [name of business owner], are increased referrals for your business and a core group of business people you can rely on to refer you to others.”

**<Business Owner>**

“That would be great, especially right now in this economy.”

**<Agent>**

“Well, I’m glad you agree.”

## COMMUNITY

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# BUSINESS BITES WITH BUSINESS OWNERS DIALOGUES

(CONTINUED)

### **If this is a Business Owner you know you can put your name to:**

**<Agent>**

[Introduce your Business Directory.]

“Right...and I have an opportunity you may want to take advantage of...”

“Because of the nature of my business and the depth of the relationships I have with my clients, I refer people to businesses like yours on a regular basis. In order to make this hassle-free for my clients, I’m putting together an easily accessible online Business Directory of select local businesses I trust.”

“My Business Directory will include attorneys, financial planners, loan officers, hair salons, pizza parlors, painters, roofers and veterinarians, just to name a few.”

“There is NO COST for you to have this type of exposure to my clients. My only request is that you do an excellent job for them, like you always do.”

“Would you like to be included in my Business Directory?”

**<Business Owner>**

“Sure. It sounds like a great opportunity to get more business in a way that doesn’t take extra time or effort on my part.”

**Note: When it comes to referrals, make sure you give first. Listen for opportunities to refer your clients to this business owner. If you receive personalized Items of Value as part of your Membership, why not feature their business on your next Item of Value.**



## COMMUNITY

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# BUSINESS LUNCH DIALOGUE

### Invitation to Lunch Dialogue

“Hi [Paul], this is [Your Name] calling. I just spent two days at a seminar learning systems on how to generate referrals. After leaving the event, I thought this information might be helpful for your business too. I’m so excited about this information, I just want to share it with business people I know. If you’d like, we could set a lunch date.”

### Self-Paced, One2One, Group Coaching Member’s Dialogue

“Hi Paul, this is [Your Name]. I don’t know if I mentioned it to you, but I am currently being coached by the leading business coaching company in North America on how to operate my business. My Coach is helping me to implement a series of systems that generate a predictable stream of referred clients. I was thinking that this information might be very helpful in your business. I would be happy to share this information with you. Does this sound like something that you would be interested in? Why don’t we arrange a time to get together for lunch, and I’ll bring my Coaching Manual and show you what I’m learning.”

### Reciprocal Dialogue

“[Paul], I want you to know that I refer you because you’re the best \_\_\_\_\_ I know, and I’m proud to associate my business with yours.”

[Chit chat]

“[Paul], I also work by referral and I’m never too busy for any of your referrals.”

## COMMUNITY

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# BUSINESS LUNCH DIALOGUE

### Follow-Up Dialogue

After giving a referral, always follow up with a phone call.

“Hi, [Paul], this is [Your Name]. I just wanted to check in with you to see how the referral I sent you to [John Smith] worked out.

[Wait for response.]

“Let me know if there is anything else I can do to send you the type of client you want.

“Oh, by the way... don’t forget, I also like to work with referred clients, and I’m never too busy to take care of your referrals.”