



DATABASE MASTERY REALTOR GUIDE



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6X12 PROGRAM

STARTING A RELATIONSHIP

What is a relationship?



re·la·tion·ship

/rə'lāSHən,SHIp/

noun

the way in which two or more concepts, objects, or people are connected, or the state of being connected.

6 Ways to Maintain a Relationship

1

Meet In Person

- 2x a year
- Invite them to get coffee
- Ask them to happy hour

2

Email them

- 12x a year
- Monthly video emails
- Market updates

3

Give them a call

- 6x a year
- Birthday, anniversary, news, big life changes

4

Client Events

- 2x a year
- Lunch & Learn
- Wine & Wisdom

5

Write them

- 4x a year
- Invitations, letters from the heart, birthday cards

6

Text them

- 1x a month
- See All About Your Form
- News, Value

EMAIL TEMPLATES

30 & 60 DAYS

30 Day Email

Subject: Happy One Month in Your New Home!

Dear [Client Name],

Happy one month in your new home! Are you all settled in or still wading through the mazes of boxes (I like to make a fort)?

Some helpful monthly maintenance tips to save time and money:

- Clean the furnace filter monthly
- Inspect tub and sinks for debris
- Test smoke and carbon monoxide detectors
- Vacuum heat registers and heat vents
- Clean gutters

I wanted to also remind you of the resources available to you as a homeowner. If you need any recommendations for local services such as cleaners or handymen, or if you have any questions about your home warranty, please let me know.

Thank you for entrusting me with your home purchase, and I hope you continue to enjoy your new home for many years to come.

Best regards,
[Your Name]

60 Day Email

Subject: 60 days after closing

Dear [Client Name],

I hope this email finds you well. I wanted to reach out to you and check in with you 60 days after your closing. I hope you are enjoying your new home and everything is going smoothly.

I wanted to thank you again for choosing me as your realtor and allowing me to help you through the home buying process. It was a pleasure working with you and I am so glad that we were able to find you the perfect home.

If there is anything I can assist you with or if you have any questions or concerns, please don't hesitate to reach out to me. I am always here to help in any way I can.

I also wanted to touch base with you about your referrals. If you have friends or family members who are in the market for a new home, I would be honored to help them in the same way I helped you. Your referrals are the biggest compliment I can receive and I would be grateful for the opportunity to assist them.

Again, thank you for your business and for your trust in me. I look forward to staying in touch and hearing about your continued happiness in your new home.

Best regards,
[Your name]

EMAIL TEMPLATES

90 & 120 DAYS

90 Day Email

Subject: Checking in on Your Recent Home Purchase and Checking in on You!

Dear [Client Name],

I hope this email finds you well. I've been thinking about you lately and wanted to reach out to check in on how you're doing. It's been about 90 days since the closing and I wanted to make sure that everything has been going smoothly for you and your family in your new home.

Is there anything that I can assist you with? Have you encountered any issues or have any questions regarding the home or the neighborhood? I am here to help and provide any resources or information that you may need.

Additionally, I wanted to remind you of the home warranty that was included in your purchase. If you have any concerns or need to file a claim, don't hesitate to reach out to me for guidance.

I also wanted to take this opportunity to ask how you and your family are adapting to the new home and neighborhood. I remember how excited you were about this new chapter and I hope that everything is exceeding your expectations.

It was a pleasure working with you on this exciting journey and I hope that you are enjoying your new home and all it has to offer. Please let me know if there's anything I can do to support you.

Your friend,
[Your name]

120 Day Email

Subject: Checking In on Your New Home

Dear [Client Name],

I hope this email finds you in a cheerful mood and with a smile on your face! It's been approximately 120 days since you closed on your new home and I wanted to check in and see how everything is going.

So, have you and your family settled in and turned your new house into a home? I hope you're enjoying your new surroundings and that all of your furniture has finally stopped arguing with each other about who gets the best spot in the living room.

In all seriousness, I wanted to remind you about the importance of regular home maintenance. It's like visiting the dentist - no one really wants to do it, but it's necessary for a healthy and happy home. So make sure to change those air filters, check your appliances, and get that HVAC system serviced regularly. Trust me, your home will thank you.

Lastly, if you know anyone who's in the market to buy or sell a home, I'd be honored to help. Plus, it'll give me an excuse to send them helpful emails like this one.

Stay safe and keep smiling.

Best regards,
[Your name]

EMAIL TEMPLATES

150 & 180 DAYS

150 Day Email

Subject: Checking in on Your Recent Home Sale Experience

Dear [Client Name],

I hope this email finds you in good health and spirits. I wanted to personally reach out to you today and check in on the purchase of your **[property address]** that closed 150 days ago. It was an absolute pleasure working with you and I am grateful for the opportunity to assist you in the sale of your beautiful home.

I still remember the excitement you shared with me when you first decided to buy your home, and I am overjoyed to have been a part of that journey with you. I hope the process was a smooth and successful one for you.

As a realtor, I take pride in being a trusted advisor to my clients and providing top-notch customer service. I am writing to see if there is anything I can assist you with or if you have any questions or concerns regarding your recent home sale.

I also wanted to remind you that I am here for you. Whether you have questions about the local real estate market or simply want to catch up, I would love to hear from you.

Please reach out if there is anything I can do to be of service. I truly value our relationship and am always here to help.

Wishing you all the best,
[Your name]

180 Day Email

Subject: 6 months since closing

Dear [Client Name],

I hope this email finds you well and that you are enjoying your new home. I wanted to personally reach out to you today, as it has been six months since the purchase of **[property address]** closed. It was an honor to be a part of such an important chapter in your life and I wanted to thank you again for choosing me as your real estate agent.

As I reflect on our time working together, I am filled with gratitude for the trust you placed in me. I still remember the excitement you shared with me when you first decided to buy your home and I am honored to have been a part of that journey with you.

I understand that buying a home can be a complex and emotional process, and I wanted to reach out to see if there is anything I can assist you with or if you have any questions or concerns. I am here to help in any way that I can.

Some helpful maintenance ideas to do every six months:

- Change the smoke detector and carbon monoxide batteries
- Vacuum lint from the dryer vent
- Clean the kitchen exhaust fan filter

I look forward to hearing from you soon.

Talk to you soon,
[Your name]

EMAIL TEMPLATES

210, 240 & 270 DAYS

210 Day Email

Subject: Just Checking In on Your Recent Home Sale Experience

Hey [Client Name],

Hope you're having a fantastic day! Wanted to reach out and check in on the purchase of your [property address] from 210 days ago. It was an honor to work with such a rad client and I'm grateful for the opportunity.

Quick question, do you still have boxes to unpack? Just kidding! (Or am I?) But seriously, is there anything I can assist you with or do you have any questions about the sale? I'm here to help in any way I can.

So, how's life in your new abode? Is there a fun neighborhood ghost? I hope so!

Anyway, let me know if you need anything. Have a great day!

Your friend,
[Your name]

240 Day Email

Subject: It's me again.

Dear [Client Name],

I hope this email finds you and your family doing well. If you're like me, you still have a few boxes left that you'll just ignore for 5 years.

You're not the only one who loves your home. Bugs and mice might too. Be sure to keep an eye out for trails or signs of infestations.

As always, please let me know if there's anything else I can do to help.

Warm regards,
[Your name]

270 Day Email

Subject: How's the New Home?

Dear [Client Name],

I hope this email finds you and your family in good health and spirits. I wanted to reach out and personally follow up on the closing of your new home. It's hard to believe it's already been seven months.

I know that the process of moving into a new home can be both exciting and overwhelming, and I wanted to check in and see if there's anything I can do to help. Have you and your family settled into your new home comfortably? Is there anything I can assist with regarding your home?

Lastly, if you know of anyone who's looking to buy or sell a home, I'd be honored to have the opportunity to work with them. Your referrals are the greatest compliment I can receive, and I truly appreciate your trust in me.

Warm regards,
[Your name]

EMAIL TEMPLATES

300, 330 & 365 DAYS

300 Day Email

Subject: Checking In on Your Home Sweet Home!

Hey [Homeowner's Name], Long time no chat! I hope this email finds you in good spirits and surrounded by all the comforts of home. It's been a whole 300 days since you closed on your new abode and I just wanted to see how you're doing.

Are the walls still standing? Did you finally find a place for all your [insert favorite hobby] gear? Is your [insert household pet] adjusting well to the new digs?

And if there's anything I can do to help, just shout! I'll even bring over some cookies (or at least, I'll send over the recipe for some killer cookies).

Just kidding (kind of). But seriously, if there's anything I can do to make your experience as a homeowner even better, I'm always here for you.

Take care and stay cozy,
[Your name]

330 Day Email

Subject: Following up on Your Home Purchase

As we come up on a year in your home, I wanted to take a moment to reflect on your home-buying journey with me.

I wanted to check in and see if there's anything I can assist you with, or if you need any referrals for home related services. It's been my pleasure to have helped you find your [first, dream] home, and I'm here to support you in any way that I can.

Additionally, I'd love to hear about your experiences in your new home, and any feedback you may have. Your satisfaction is of utmost importance to me, and I'm always looking for ways to improve my services. Please let me know if there's anything on your mind or if you'd like to schedule a follow-up call or meeting. I'd be more than happy to connect with you.

Warm regards,
[Your name]

365 Day Email

Subject: How's the New Home?

It's hard to believe that it's been a full year since you became the proud owner of your beautiful home! I wanted to take a moment to reach out and extend my warmest wishes on this special occasion. I still remember the excitement and anticipation you felt as we toured homes and found the perfect one for you and your family. It was a privilege to be a part of such an important moment in your life, and I'm thrilled that you've been able to settle into your new home and make lasting memories.

As we reflect on the past year, I hope that your experience has been everything you hoped it would be. I'm sure the love and care you have put into your home is reflected in its warm and inviting atmosphere. If there is anything I can do to assist you with your real estate needs, please do not hesitate to reach out. I would be more than happy to help.

Here's to many more happy years in your beautiful home!

Warm regards,
[Your name]

TEXT SCRIPTS

MONTHLY TEXTS

January

[Client name], Happy New Year! I hope this text finds you in good spirits! As we enter the new year, I wanted to remind you that I am grateful that you are part of my life and business. [Your name]

February

Hi [Client name], wanted to check in to see if you're surviving the winter in your new home. Just kidding, I know you're loving it there. But if you need anything, I'm just a text away. Happy February! [Your name]

March

Hi [Client name], it's [Your name] checking in to see how you're doing. Spring is around the corner so if you need ideas or professionals to help to spruce up the place, let me know. Happy Spring Cleaning!

April

Hi [Client name], it's [Your name] checking in to see how you're doing. Spring is around the corner so if you need ideas or professionals to help to spruce up the place, let me know. Happy Spring Cleaning!

May

Hi [Client name], just wanted to drop a quick message to see how you're doing. May is here and I hope you're taking advantage of the beautiful weather. Any summer vacations planned yet? [Your name]

June

Hi [Client name], it's [Your name] here to bring some summer cheer to your messages. How is the first summer in the new place? Did you start a garden or do any outdoor changes? Remember to wear sunscreen. If you need anything, I'm here.

July

Hi [Client name], I hope you're having an amazing summer in your new home! Have you been to any concerts or outdoor venues? Here's to summer fun! [Your name]

August

Hi [Client name], it's [Your name] checking in to see how everything is going. I hope you're making the most of these last few summer days. If you need anything, as always, I'm here.

September

Hi [Client name], wanted to send a quick message and check in. It's hard to believe it's already September and fall will be here soon. This year has flown by. Wanted to remind you that I continue to be here if you need me. [Your name]

October

Hi [Client name]! Wanted to wish you a spooky and fun-filled October. I hope you're enjoying your new home and loved watching the change leaves in the yard. If you need anything, let me know. [Your name]

November

Hi [Client name], I hope you're staying warm in your new home. Will you host your first Thanksgiving or being going somewhere? I am grateful for you this and every month. Happy Thanksgiving! [Your name]

December

Happy first holiday season in your new home, [Clients name]! I'd love to see pictures of your decorations. Love and joy come to you, [Your name]

PHONE CONVERSATIONS

GENERIC AND MONTHLY TOPICS

Any time of the year:

- Personally invite them to an event you're hosting (this will help at least 2x per year)
- Invite them to a benefit for your favorite charity
- Thank them personally for referring a client to you
- Happy Birthday!
- Happy Wedding Anniversary!
- Get better/congrats/check in on something they posted on Facebook
- Tell them about a favorite new restaurant
- Call for local events that match their hobbies (5K run, golf tournament)
- Annual review
- Inform them of market trends, interest rates lower
- Do they need a vendor that you can introduce them to?
- Did their favorite sports team just make a big announcement or win a big game?

January:

- Change filters to lower electric bills and ensure efficiency
- Happy New Year - share a favorite quote or inspiring message for the year
- Reminder that they will get a tax bill from the assessor but it will be paid by their escrow account (if escrowed)

February:

- Check for peeling paint that could get worse in the cold/snow
- Oil garage door hinges and doorknobs that have frozen all winter

March:

- Daylight savings - turn back clocks and change smoke detector and carbon monoxide detectors
- Fill in bald patches before warmer weather comes, reseed and fertilize your lawn

April:

- Schedule maintenance for HVAC before AC is needed

May:

- Check the sprinkler system
- Clean gutters

June:

- Summer is here - the bugs are back - check for pests
- Look for stagnant water around your home or in the yard

July:

- Check drains to make sure summer storm water runs away from the foundation
- Make sure to water lawns thoroughly if they plan to light legal fireworks

August:

- Deep clean carpets to extend life span

September:

- Check and clean exhaust fans in the bathroom, kitchen, and laundry room

October:

- Hire an exterminator to spray inside and outside. Bugs will look for a heat source as it gets colder
- Happy Halloween - announce your pumpkin carving contest, best pumpkin gets a prize

November:

- Fall back is gone but still need to change your smoke and carbon monoxide batteries
- Winterize pipes if they haven't already
- Wish them a happy Thanksgiving in their new home
- Share a favorite Thanksgiving recipe

December:

- Do windows need to be resealed to keep in heat?
- Happy Holidays in your new home
- Gratitude call to thank them for being part of your year

LETTER OF THE HEART

HOW TO, EXAMPLES, IDEAS

“Quote here to tie your letter together”

Dear [Client Name],

This letter is about me as a person and not as a lender. I am a really good lender but, if during my funeral, that is talked about, I will feel like I wasted an opportunity and a life. Every other month I write a letter about me personally and goes to my database.

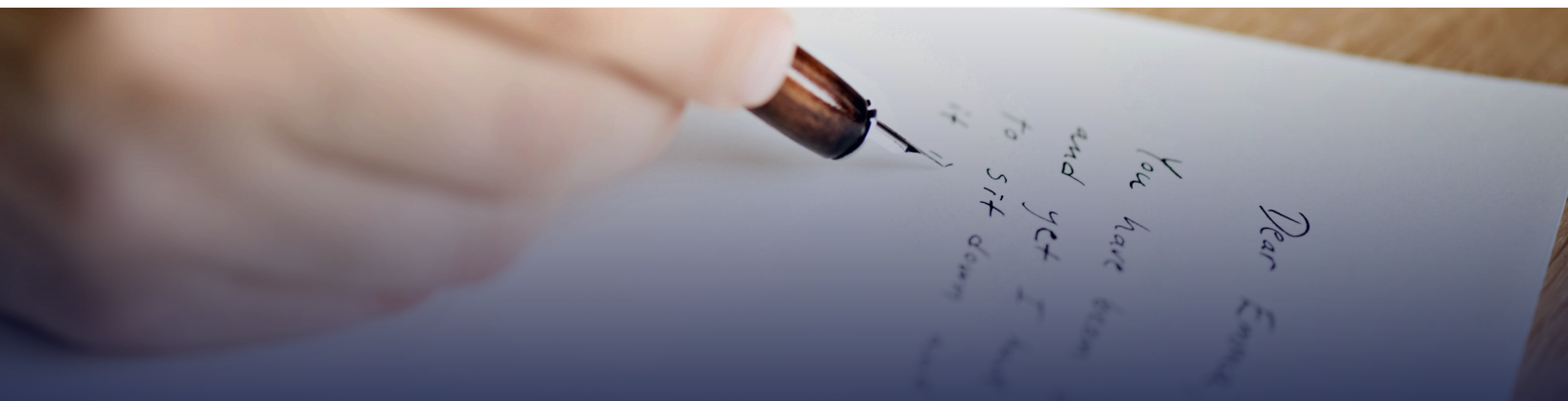
When I first heard this idea, I was doubtful that anyone would care. I felt like they wanted [Your Name] - the mortgage person and didn't really have a need-to-know [Your Name] - the actual person. This idea was given to me by my business coach. My philosophy is 'if someone more successful than me suggests doing something, I will do it'. So, I did. I wrote the letters and sent them. I wrote about failed resolutions and struggles of parenting. I've written about being too hard on myself, the benefits of gratitude in my life, climbing Pikes Peak, feeling like I was in a storm without a paddle. I've written about me: good and bad. The letter is usually 3-4 paragraphs and can fit on one page.

Since then, I have received more emails, calls, texts about this than anything else I've done. When, during COVID, I was unable to send them, people reached out to me to ask if they missed it. Once, a person came to my office to give me a hug because 'I felt like you were in my head and you understood me'. I have been in offices where my letter was pinned on the bulletin board for the 'reminder'.

These letters are printed on seasonal stationery and come in a colored envelope so it stands out from other mail. Though it's time-intensive, I believe it is one of the more impactful things that we do. This could also be emailed to cut expenses.

Your friend,
[Your Name]

PS The PS can be real estate related and include a call to action. But only the PS - I have included several examples of previous letters.



EVIDENCE OF SUCCESS POSTCARD

HOW TO, EXAMPLES, IDEAS

The goal of the letter of the heart is to get people to know you as a person. The goal of the evidence of success is to remind them that you are a really good realtor.

On the opposite months that the letter of the heart is sent, send the postcard. They can be printed, mailed and postage paid as a bulk rate by local printers.

The EOS is sent as a quick postcard to share a success that you have had. The attached format can be customized to print 4 postcards per page at minimal cost. They will read this postcard (likely to determine if it's junk or not) and they will read your success story.

This postcard should be sent to your entire database as well. Though the focus of this playbook is past clients, your entire database should be reminded as your successes as a realtor as well as know you deeper as a person.

Some topic ideas:

- A listing that you sold after it expired after another agent had it listed
- A buyer who was able to secure a home below asking price and/or with seller concessions
- Working with a buyer for a year before finding their dream home
- Your formula for staging photographs cleaning to ensure showings on the first day Personally painting, fixing, cleaning, repairing your sellers listing to get it sold/address appraisal conditions
- Examples of win/win solutions found to help both buyers and sellers keep a deal together Your ability to negotiate and how it impacted your buyer or seller



EVENT CHECKLIST

Name: _____ Budget: _____

Date: _____

90
DAYS OUT

- Confirm Location is booked for date & time
- Confirm deposits/costs
- Verify any partners/sponsors are set with date, time & needs

60
DAYS OUT

- Check with Loan Officer about the topic
- Create flyer
- Any misc. marketing needs /materials are scheduled for production i.e. "swag"

3
WEEKS PRIOR

- Order food/drinks for event
- Blast/invitation
- Send out e-mails
- Personally call invites

2
WEEKS PRIOR

- Start RSVP List
- Advertise on social media
- Prepare topic material
- Send out e-mail blast/invitation

WEEK
OF

- Text blast to invite list
- Confirm finals
- Email partners/sponsors with headcount

2-3
DAYS PRIOR

- Updated headcount to venue
- Handouts / Sign-In Sheets / Surveys prepared in folder with all marketing materials

DAY
OF

- Text blast to RSVP's " Look forward to seeing you"
- Handouts / Sheets / Surveys packed
- Social Media posts/pics/live feeds

NEXT DAY/WEEK
DAYS OUT

- Review surveys with speaker
- Add to 10-week follow up/CRM
- Send Thank You cards

EVENT PLANNING SPREADSHEET

Event Detail				# of Guest				EVENT TIMELINE					
Name of Event		The Formula						1 Month Prior		TASK		Assign	complete
		Improve Your Marketing Message								Reserve Venue		JM	X
Date	4/30/2019	Time	10am - 2pm				3 Weeks Prior		Create Facebook Event		DK	X	
Venue	The Salmon House								Create Eventbrite Page		DK	X	
Address	401 NE Northlake Way Seattle, WA 98105						2 Weeks Prior		Create/Edit Flyer		JM		
Venue Contact info		Name	Manager William, Events Coordinator Michelle Stone						Confirm Menu		JM		
		Ph #	(206) 632-0767	Email	shbanquets@keepclam.com		Handwritten invites mailed		JM				
Objectives	Learn the Hidden Success Levers In Your Marketing						1 Week Prior		Create mail post cards		JM		
Audience	Real Estate Agent / Lender currently helping 20 families or more a year								Post at/around venue		JM		
Speaker 1		Name	Robert Stover				Day of Event		Begin FB Ad/Event		DK		
		Ph #	see DK for info						Dial-in slide deck/handouts		DK		
		Topic	The focus will be on creating a message that leads to action!				Post Event		Mail post cards		JM		
Speaker 2		Name	Jenny Keller						Email leads + database		DK		
		Ph #	see DK for info				Call top 50 VIPs ask for help		DK				
		Topic	Howto build a multi-million dollar brand				Begin fb Ad #1 (image/stat)		DK				
Space/ Room Details		Room Size			# of Tables		Pop by venue to schmooze		JM/DK				
		Room Set- up					Confirm Guest List 4 menu		JM				
Venue Minimum/Room Charge				DUE		Call business ppl		DK					
Notes				Paid		Begin fb Ad #2 (video)		DK					
						Send email invite to all leads		DK					
Hand-Outs		#	INT	Supplies	#	INT	3-days out, email all attendees		JM				
Class Sign-in Sheet				Name Tags			Remnider email attendees		JM				
Class Intake Survey				Pens			Personal FB/insta post		DK				
Stratgy Sessions Sign-in Sheet				A-boards (2)			Call venue		JM				
				Flyers for opens			Print all docs/supplies		JM				
				Sign rider for opens			Arrive 1.5 hours early/setup		JM				
							V						
Facebook AD Series		AD Series 1					Weekend Strategy Session		DK				
		AD Series 2					Review survey/feedback		DK				
		AD Series 3					TY cards send		JM				

*See spreadsheet file

- Utilize this spreadsheet for event organization.
- Monitor invites, attendees, sponsors, speakers, and keynotes.
- Evaluate the event's success.
- Manage all pre-event and post-event tasks efficiently.

HAPPY HOUR CHECKLIST

Name: _____ Budget: _____

Date: _____

14
DAYS OUT

- Determine event location
- Create flyer

10
DAYS OUT

- Finalize flyer
- Provide flyers to partners & clients
- Email flyers to staff
- Request RSVP's and provide date
- Post flyers in officer

7
DAYS OUT

- Send reminder to partners and clients
- Remind staff

MORNING
OF

- Check RSVP totals

AFTERNOON
OF

- Provide admin with head count & RSVP list

EVENING
OF

- Arrive at venue approximately 15 minutes prior
- Determine appetizers to order
- Provide credit card to bartender
- Advise who is covered on tab
- Place order, pending arrival of guests
- Take photos

DAY
AFTER

- Post photos on Facebook/social media and tag appropriate parties