

CLIENT PROFIT JOURNEY

For Agents & Lenders



**The 8-Step Plan for Getting
Leads and Turning Them
into Raving Fans**

ABOUT BY REFERRAL ONLY

By Referral Only is a powerful marketing system that allows real estate agents and mortgage professionals to automate their client and lead nurturing while creating new opportunities and referrals... all on auto-pilot.

OUR MISSION IS SIMPLE:

To give you the systems, training and support that will help you save time and frustration. We automate all of your online and offline marketing so you can focus on nurturing relationships and growing your business.

**Consider us your one source to help you
get more appointments, gain more
listings, and close more deals!**

300 Carlsbad Village Dr, Ste 108A #65, Carlsbad, CA 92008 | 800-950-7325 ext 3801

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WANT MORE BUYERS, SELLERS, BORROWERS KNOCKING AT YOUR DOOR, READY TO DO BUSINESS WITH YOU?



Then you need to improve your marketing plan by understanding the **Client Profit Journey (CPJ)**.

The **Client Profit Journey** is about turning strangers into raving fans that want to shout from the rooftops about your unique abilities and value. While we all love to get new leads and referrals, we are going to deep dive into how to do it the right way, and on auto-pilot (the best kind of marketing)!

The *By Referral Only* CPJ stands out in this industry because it dissects the step-by-step process for attracting, converting, and getting your best customers to be the ultimate promoters of you and your services.

And because we want to give you a drop-dead easy way to implement this strategy in your own business, we've made this super-easy to understand.

KEEP READING FOR A QUICK OVERVIEW AND HOW TO BUILD THE IDEAL CLIENT PROFIT JOURNEY IN YOUR OWN BUSINESS.

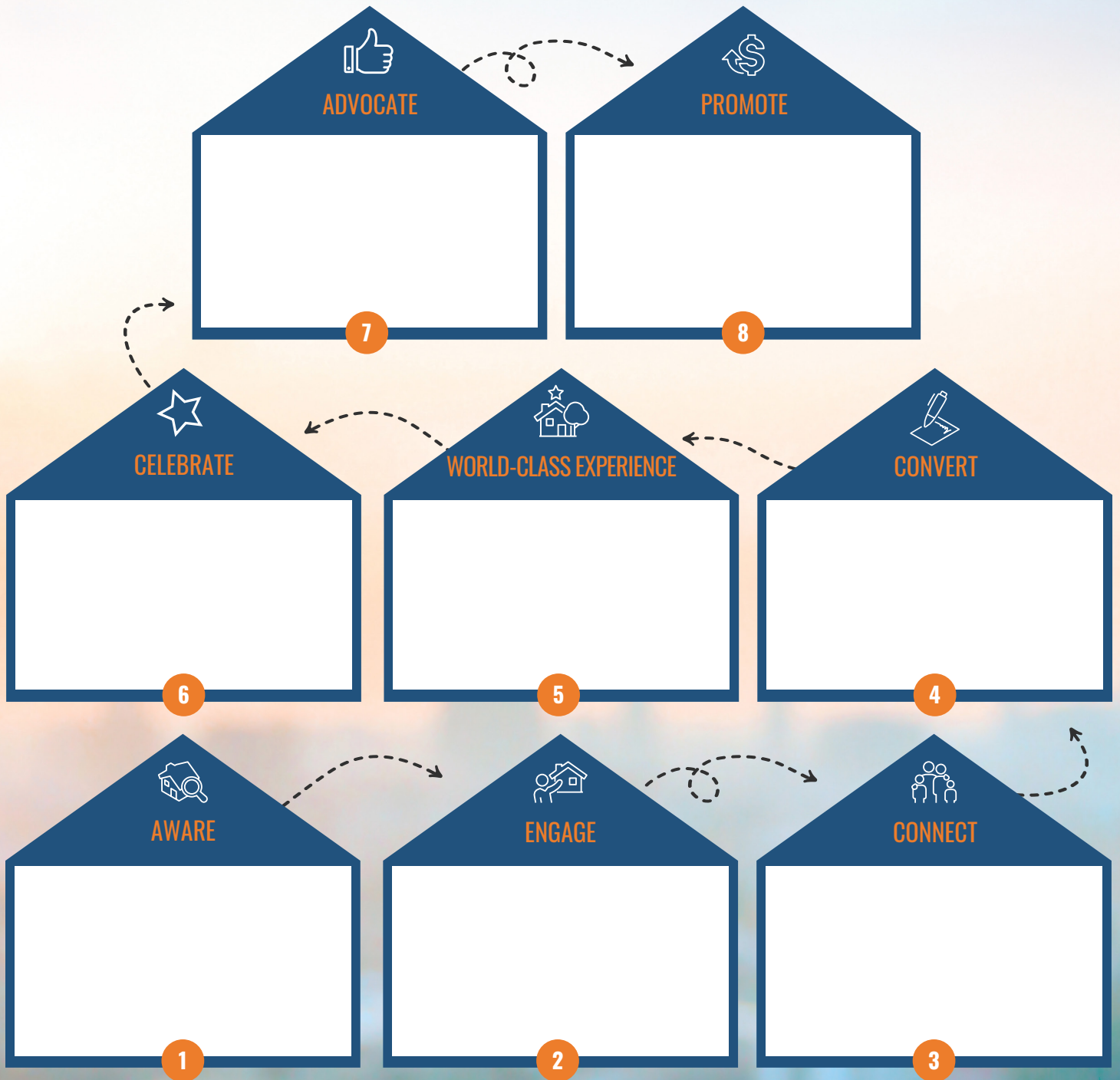
The CPJ is an 8-step path that people travel down as they discover:

- Who you are
- How you lead, guide, and protect them through the process of buying, borrowing, or selling
- Ultimately become raving fans.

If you map it out, it would look like this:

CLIENT PROFIT JOURNEY

Worksheet



BUT HERE'S THE PROBLEM...

People can easily fall off the Journey path. You have to keep them interested, engaged, and connected throughout the entire journey with you if you want to get them to make it to the end where they become the ultimate advocates and refer more and more people back to you.

That's why you need to create a REAL STRATEGY & SYSTEM that walks them through all 8 steps, keeps them connected to you, and continues to encourage them along the way.

Let's look at each step and see how you might do that.



STEP: 1 MAKE THEM AWARE

It's simple. Somehow you need to get on their radar.

This might happen through some sort of advertising, lead-generation marketing campaign, social media interaction, event, or introduction by someone that knows, likes, or trusts you.



For this, you need to connect with content (your unique messaging) that gets attention and do it using multiple forms of media.

Never Be Forgotten Again!

Having a lead nurturing system is essential for Agents & Lenders in today's highly-competitive market. Adding someone, who maybe isn't quite ready yet, into a buyer or seller nurturing email sequence keeps them warm with YOU directy. How many times have you had a past client or lead end up listing or financing with someone else? Having a nurturing sequence could be the key to this never happening again.



STEP 2: GET THEM TO ENGAGE

It's one thing to have someone on your email list or follow you on social media. It's a whole other thing to get them to reach out to you and connect directly.

Conversations = Opportunities = Commissions

This is where very strategic content that encourages people to call, email, or comment back is incredibly important. A generic newsletter that your broker provides that every other agent also sends is NOT what we are talking about. Posts that show your most current listing...nope not that either. Your generic holiday or birthday email is also not going to cut it.



To get the engagement you want and need...you must... get them emotionally involved.

In fact, Merriam-Webster defines *engagement* as emotional involvement or commitment. To do this you need to deepen the relationship with them.

So the minute you get them on your list or following you socially, you need to create an ongoing conversation with them in multiple channels: email, messenger, online, social media, direct mail, text, etc.

Marketing Automation is Key to Your Success!

This is exactly why *By Referral Only* developed a marketing SYSTEM that allows you to automate your marketing. We know how hard and time-consuming it is, that's why we do as much of it for you as we can. We write, plan, and send it all for you! Regardless of whether you use our systems or your own, automation makes your messaging CONSISTENT and that's key to your success.



STEP 3: GET THEM TO CONNECT PERSONALLY

People like to do their homework before they jump in. So they may start their journey with you by kicking the tires a bit. Everyone is called to action in different ways. Some need to do their homework by getting on your email list, getting a download from your website, following you, and watching from the shadows on social media... the trust needs to build.



Or maybe they were referred to you by a friend or former client. Either way, tire kicker or direct referral, you need to move them to the step of meeting with you. Maybe it's in person during the face-to-face Initial Consultation, on zoom, or just a phone conversation but that personal connection is your ultimate goal.

YOU OFFER THEM SOMETHING THEY WANT AND DEEPEN THEIR UNDERSTANDING OF WHAT YOU CAN DO FOR THEM.
NURTURE = RELATIONSHIP = TRUST.



STEP 4: GET THE CONTRACT...CONVERT THEM!

If you get them to the point of Initial Consultation or Listing Presentation, as long as you have the skills and processes to lead them to the finish line, you'll hopefully WOW them and walk away with a contract.

SUCCESS!

Your work is only starting, but the trust has been built, the relationship is forged, and you are in a great position to pre-write the success story about to happen.

They have begun their journey with you. All you need to do now is lead them down the last few steps of the path and you'll secure an advocate for life!

Do you have tools and marketing set to connect with people Before, During, and After the transaction?

YES, you need to be speaking to them in different ways at each phase of the process. At *By Referral Only* we show our members how to do everything from “uplevel” their presentation game, keep a new lead interested and engaged until they are ready, all the way to staying connected with clients so they refer more and more new business to you after the closing is complete. Every level deserves special language and attention, THIS is what we do best at *By Referral Only*.



STEP 5: SET THE STAGE & GIVE THEM A WORLD-CLASS EXPERIENCE

Now your job is to get (and keep) them excited and sold on your ability to help them through the process. Give them the ah-ha moments where they know you, and only you, are the one to help them. You must provide exceptional service, a memorable experience, and superior support from start to finish. Seems like a “no brainer” but many drop the ball on communication and stop working to keep the client excited. They simply just provide the service... that’s not going to cut it today. You simply must do more.



How to Give A WORLD-CLASS Experience

At *By Referral Only* we call that C.A.R.E. - Creating A Referrable Experience. Over the last 35 years, we have pinpointed the key touchpoint systems that must occur automatically throughout this process. We provide our members with time-tested templates and scripts that turn each transaction into two additional transactions during the client experience. It’s a beautiful thing.



STEP 6: SEAL THE DEAL

Find the home, sell the home, or close on the loan and make them feel like they made the best decision they possibly could have made. How you make them feel about their decision at this point is key. From the minute they decided to the act of signing on the dotted line, and even in the days after... they should know and feel how you have their best interest in mind and that you truly care about their happiness and satisfaction today... and beyond.



STEP 7: ASK THEM TO SPREAD THE LOVE

Happy clients LOVE to share their experiences, but they often need to be reminded to do so. The best part is that once they do, they will be even more loyal to you.



At this stage, you MUST have processes in place to make giving you a video or written testimonial a breeze for them. Links to your social media, Google listing, or assisting them in recording a video testimonial should be built into your overall marketing plan.

THE MARKETING DOESN'T STOP AFTER THEY CLOSE. IT'S ONLY THE BEGINNING.



STEP 8: MAKE THEM A RAVING FAN

This step is where you turn your happy client into a raving fan. All you need to do is consistently communicate with them and remind them to “not keep you a secret”.

So how do you consistently keep top of mind for weeks, months, and years after the transaction? How do you ensure they remember that amazing experience they had with you, enough to be your advocate and tell anyone that they know who may need your help?

You have strategic, well-thought-out marketing in place that works continuously to keep you on their radar.

These are not emails with your current listings or rates. Not a generic broker-provided newsletter. Not mailers that say Just Sold either. These are communications that are genuine, authentic and remind them of YOU and how you helped them.

Plus, when they refer you, they become the hero to their friends and family. They know that you are going to make the process smooth and comfortable for their loved ones, and that will reflect well back on them.

IT'S A WIN-WIN FOR EVERYONE!

What We Do Best

At *By Referral Only* we automate this marketing communication process for our members. **When you join our community, you can immediately tap into:**

- The **7+ Essential Communications** - written and sent-for-you, postcards, newsletters, birthday emails, special occasions & holiday emails
- **Dominate Your Farm Lead Generation Campaign** - Automated “set and forget it” lead generation system to get NEW leads in your local market!
- **What’s My Home Worth Campaign** (also generates listings fast!)
- **Smart Guidance Funnel** - Lead Nurturing Funnel, never be forgotten again!
- Monthly done-for-you **Social Media Package**- just copy, paste, and post!
- The *By Referral Only* **Referral Network** & Member-Only Community
- **Unlimited support** from our team of experts

All of this is in addition to tons of additional on-demand marketing campaigns, event marketing help, skills training opportunities, personal development training, ...and soooo much more.

HOW TO HELP PEOPLE ON THEIR JOURNEY

Connecting deeply with prospects and clients is essential in making their journey a memorable one. That's why you can't use generic, cookie-cutter marketing (what most Agents and Lenders use, unfortunately.)

People want more.

You need a plan that addresses every stage of the Journey. And the best way to ensure it happens flawlessly is to automate that Journey.

TO GET STARTED, TAKE A LOOK AT YOUR CURRENT CLIENT JOURNEY. FIND THE GAPS. SEE WHAT'S MISSING. PUT TOGETHER A STRATEGY THAT ENSURES PEOPLE ARE EXCITED ABOUT WORKING WITH YOU... AND REFERRING TO YOU.

THIS IS HOW YOU EARN A CUSTOMER FOR LIFE!

