

Building Referral Relationships Checklist

In our second onboarding training, loan officers focus on the theme of **building your business using referral partnerships**. Use the checklist below to review low-, medium-, and high-effort actions you can take to ensure you are the trusted advisor and expert for your referral partners.

Good

- Invite high-value partners to co-market on Total Expert to start, then expand your network.
- Turn on *New Listing* and *Pending Listing* notifications in your Account Settings page.

Better

- Create and send an Open House Lead Capture App, a Single Property Website, and a flyer for each new partner listing.
- Congratulate agent partners on new and sold listings via social media.
- Review effectiveness of co-marketing relationships and individual marketing tools on a regular basis.

Best

- Post Single Property Websites and Open House Lead Capture Apps to social media to generate attention and excitement ahead of open houses.
- Create multiple types of print marketing for listings, including rate and infographic flyers, door hangers, postcards, and more. Also consider creating different versions of the same type of marketing to cater to different audiences.
- Set up QR codes for all strategic listing assets to allow easy and convenient digital access.