



Building Referral Relationships Checklist

Right After Training

- Connect with top referral partners as co-marketing partners.
- Ensure that the Receive Co-Marketed New Listing Alerts and Receive Co-Marketed Pending Listing Alerts notifications are turned on.

For Each New Listing

- Create an open house lead capture app.
- Create an MLS-integrated flyer.
 - Infographics
 - Listing flyers
- Create a single property website.
- Distribute materials:
 - Send an email to your co-marketing partner.
 - Share materials on social media and include your co-marketing partner in the caption.

For Each Sold Property

- Send a congratulatory email to the real estate agent.
- Consider sending a Just Sold postcard using EDDM, if available.
- Update the single property site:
 - Change the banner to show that the property has been sold.
 - Turn on forced registration to gather leads from anyone wanting to view the property price.
 - Post on social media congratulating the real estate agent for the sale.

Ongoing Tasks

- Connect with new referral partners as often as possible.
 - Real estate agents, builders, insurance agents, financial advisors, and more make great partners!
- Review effectiveness of marketing.
 - Lead capture apps: registrations, viewers, conversion rates
 - Single property sites: registrations, viewers, conversion rates
- Review effectiveness of partnerships.
 - Set up a recurring task to connect with your co-marketing partners.