

# Cindy Ertman's



## THE ULTIMATE GUIDE TO WINNING REFERRAL PARTNERS

More Leads. More Loans. More Freedom.

TRAINING GUIDE



The Defining Difference  
BY CINDY ERTMAN



# STEP 1:

## IDENTIFY YOUR REALTOR TARGET LIST

**GOAL:** Build a List of 20 Potential Realtor Referral Partners

### What Realtors Should You Target?

1. Realtors with a proven track record of buy-side transactions
2. Realtors who have active listings in your marketplace
3. Listing agents you've worked with
4. Ask for recommendations from current Realtor partners

### How to Get Access to Realtors Production Numbers

- » [MobilityMI.com](http://MobilityMI.com)
- » [MyMTA.com](http://MyMTA.com)
- » [MLS](#)
- » [List Reports](#)

### Create Your Realtor Target List

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## STEP 2:

## SOCIAL MEDIA ENGAGEMENT STRATEGY THE 30-DAY CHALLENGE - Connect and Engage

### Engagement Suggestions

1. Comment and like posts 3x per week
2. Read before you engage
3. Look for shared values and common interests such as hobbies, pets, kids
4. Share their new listings with your audience
5. Repost / share their content and tag them
6. Offer congratulations on wins
7. End every engagement with an open-ended question that starts with what, when or how

### Sample Open-Ended Questions

- » Congrats on your new listing! When are you hosting an open house?
- » I heard it was a great conference! What was your biggest takeaway?
- » Looks like you had a great run! How long have you been running?
- » This fundraiser looks amazing! How did you get involved?
- » Your dog is adorable! What breed is that?
- » Love your video! What's your prediction for the fall market?
- » Yum. Great pic. What's your favorite dish at this restaurant?



*"After 42 years in the mortgage business, I couldn't break \$38M. Within 2 years of coaching with Cindy, my production went from \$38M to \$58M to \$132M, serving more than 700 families. She has transformed my leadership, my business, and my life."*

**TOM COUTURE**  
Mortgage Loan Officer



## STEP 3:

### ULTIMATE REALTOR RELATIONSHIP PLAYBOOK 6-WEEK FOLLOW UP CAMPAIGN to Secure New Partners

#### Your Week-by-Week Plan

**WEEK 1:** Send a handwritten note card

**WEEK 2:** Send a business book to invest in their success

**WEEK 3:** Send a branded promotional item

**WEEK 4:** Send a video text with a quick market update / snapshot

**WEEK 5:** Email market trends or industry news

**WEEK 6:** Call each Realtor to ask for a 20-minute meeting

#### Call Script to Get the First Meeting

Hi <Realtor>,

*This is <Insert Name, Title, and Company>. I hope you've enjoyed getting the content that I've been sharing over the past few weeks. Clearly you have made an impression on us, so we truly want to make one on you as well! I also have a great marketing guide that my top Realtor partners are using to drive business right now. I'd love the opportunity to be able to share this with you as well and to learn more about you and your business. Would you be free to grab coffee or lunch next week on <insert date and time>?*



## STEP 3:

### ULTIMATE REALTOR RELATIONSHIP PLAYBOOK 6-WEEK FOLLOW UP CAMPAIGN to Secure New Partners

#### The 10-Step Realtor Follow Up Campaign:

- 1. Text the Realtor your contact info.** Send your vCard so it's easy for the Realtor to save it directly to their phone.
- 2. Enter the Realtor into your Database.** If possible, create a separate database just for Realtors so you can target them with custom email campaigns.
- 3. Connect with the Realtor on all social channels** and be sure to comment, like and engage with them daily.
- 4. Send a handwritten note card** thanking them for their time and expressing your excitement to work together.
- 5. Email the Realtor 2x per month** sharing industry news, market updates, rate updates, and marketing ideas. Share value consistently.
- 6. Schedule a follow up meeting** to discuss market trends and what they are doing to market their business (use Cindy's Connection to Conversion Part 2).
- 7. Invite the Realtor to monthly educational events you lead**, including masterminds and lunch and learns.
- 8. Share success stories or testimonials** from your clients or referral partners, who have benefited from working with you.
- 9. Share training videos and tips via social media** so they better understand the mortgage process and the pain points that you solve.
- 10. Send occasional gifts and tokens of appreciation** such as coffee giftcards, books or journals to show gratitude for the opportunity to build a relationship with them.



*"I thank God for you Cindy!! 8 referrals in 30 days and 3 new realtor referral partners plus 4 certified financial planners! Looking forward to working on the consistency and loans I can close...."*

**REINE RAY**

Certified Mortgage Advisor





Cindy Ertman

*Cindy Ertman is the CEO & Founder of The Defining Difference® a success-based coaching and training company devoted to helping people master the power of intentional choice to create a defining difference in their own lives.*

*After being acknowledged as one of the Top 100 Most Influential Mortgage Executives in America by Mortgage Executive Magazine for 5 years in a row and being named in the Top 100 Mortgage Loan Originators in the U.S. by Mortgage Originator Magazine for more than a decade, Cindy has now dedicated her life to empowering the growth of others.*

To learn more, visit [www.CindyErtman.com](http://www.CindyErtman.com) and click below to schedule your complimentary coaching strategy session today!

**SCHEDULE YOUR FREE STRATEGY CALL NOW!**

## The Defining Difference Coaching Programs

### Mortgage Mastermind Elite

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- Designed for originating branch managers, seasoned mortgage professionals and Top Producers, MME includes a vetted community of high-performance mortgage professionals where everyone is committed to sharing best practices and results-oriented marketing strategies to achieve next level success.
- Schedule your strategy call to learn more: [www.MortgageMastermindElite.com](http://www.MortgageMastermindElite.com)

### Platinum Private Coaching

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- Catering to high-performance mortgage loan originators and branch managers who desire private, individual guidance and support in their business and life. Our brilliant team of coaches are seasoned veterans and mortgage leaders, who will help you break through what's holding you back and accelerate your results.
- Schedule your strategy call: [www.TheDefiningDifference.com/coaching-private](http://www.TheDefiningDifference.com/coaching-private)

### Millionaire Mortgage Club

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- Designed for mortgage loan originators at all levels of success, this subscription-based membership program includes the tools and resources that helped Cindy reach 7-figure success in a LIVE, online, ongoing environment.
- Join today for just \$97 for your first month: [www.MillionaireMortgageClub.com](http://www.MillionaireMortgageClub.com)