

GOOD W.H.A.L.E. HUNTING

Strategy & Checklist for
Hunting ***EXISTING*** W.H.A.L.E.
Realtor Partners



W.H.A.L.E. = Worth Helping A Little Extra

Understanding & Creating Your W.H.A.L.E. List – Existing Agents

First, let's start by making a list of the real estate agents you are currently working with, or have worked with in the past. Next, we're going to stack-rank your real estate agents based on the opportunity they present and their productivity – your A's, B's, & C's.

For the most part, you don't want to waste time with C's on this. Some of your B's might even be suspects (until research proves otherwise). From there, you're going to grade your relationship with them on a level from 1-5 (5's are your best friends).

Once you've made your list and broken up your agents, from that list (A's & B's only), identify your W.H.A.L.E.'s – producing agents that are “Worth Helping A Little Extra.”

It is important to note that references to the acronym “W.H.A.L.E.” are not to be mistaken with the adjective, “whale” – we're not suggesting you only attempt to go after the top 1-5% of agents. Chances are you don't have one of those in your sphere of influence (yet) anyway.

If you do, great – we'll get there shortly. Keep in mind, even if you have a “whale” or two, that doesn't necessarily mean we want to start with them either – patience, grasshopper! There's a method to the madness.

So, if no “whales”, no worries -- there is plenty of business if we start by focusing our efforts on the (very attainable) producers that live in the top 10-30% of agent rankings.



Understanding & Creating Your W.H.A.L.E. List – Existing Agents

Even though we take an agent's transaction volume into consideration when assessing their W.H.A.L.E. eligibility, there are some additional areas of interest that we will look at in order to determine whether or not a given agent is a good match for you, and ultimately achieves W.H.A.L.E. status.

These include, but are not limited to: marketing (online and offline), experience/year in business, name recognition, number of and/or value of listings, and more.

In a broader sense, you can designate any Realtor that you currently have (or could have) a good working relationship with, and that can consistently refer you 1+ SALE per month as W.H.A.L.E.

To get started, simply research and provide the following information (to the best of your ability) for each W.H.A.L.E. you want to target. We'll help fill in the blanks, and secure them as an active referral source for your mortgage business.



W.H.A.L.E. Eligibility Checklist

Full Name:	Company:
Phone:	Email:
Website URL:	City & State:
Productivity Rank: A B C	Relationship Level: 1 2 3 4 5

What you already know:

LinkedIn URL: _____

Facebook URL: _____

- What kind of mortgage information are they offering on their website?

- How is their Home Search page set up on their website? (home buyer lead generation strategy)?

- How is their Home Values page set up on their website (home seller lead generation strategy)?



What you already know (continued):

- Who built their website (vertical website company, private, etc.)?

- How many listings do they have?

- What kind of marketing are they doing online?

- What kind of marketing are they doing offline?

- Additional notes:

ALSO SEE: Existing Agents – Part 2 - Locking Down EXISTING W.H.A.L.E. Agents *PDF -- strategy & scripting for setting up business development appointments with each W.H.A.L.E. Agent.*

