



## New W.H.A.L.E. Realtor Open Worksheet -- Get this info in your CRM!

Name: \_\_\_\_\_ Company: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

URL: \_\_\_\_\_ State: \_\_\_\_\_ Appt: \_\_\_\_\_

### OPEN SCRIPT – New W.H.A.L.E. Agents

This can be used on a cold call or in person.

- ▶ Have a genuine desire to help your WHALE agents.
- ▶ Ask good questions and be an excellent listener.
- ▶ Don't oversell on the open.
- ▶ Set the solid appointment.

*"Hello \_\_\_\_\_, this is \_\_\_\_\_. "I came across your website \_\_\_\_\_?" (OR –I came across your information on \_\_\_\_\_?)"*

*"Great, well \_\_\_\_\_, let me cut to the chase. I'm actually a loan officer/mortgage broker with \_\_\_\_\_."*

*"I compete with the loan officers you're currently working with."*

That last line sets the tone for the rest of your conversation.

Instead of shying away from the primary objection (they've already got loan officers they're working with), you're tackling it head-on.

By saying you compete with their current loan officers, you're immediately inferring that you've got something to bring to the table that their current mortgage partners do not.

You've got their attention. Keep going.

*"I'm sure most of them are nice people, but my experience is that typically LOs don't do ANYTHING to actually help their Realtor® partners grow THEIR business."*

*"It's like they're just kind of sitting back with their hand out waiting for referrals, and not really bringing anything to the table in return..."*

You've addressed the fact that most of their current LO partners are deadbeats 😊 without bashing them, simply by saying: "I'm sure most of them are nice people..." which diffuses any sentiment that you're just talking crap about the folks that they're working with, or questioning their judgment.

Use voice inflection!



You want to convey that it boggles your mind that, in this day and age, there are still LOs out there that don't do anything to help their agents generate business!

You can pause after the last sentence and let them chime in. This is where you'll be delighted to hear many agents cut you off and lay into their current loan officer relationships... all of a sudden, it's you and that Realtor® having a chuckle about the absurdity of loan officers expecting referrals for nothing.

*"Alright, so I take a completely different approach."*

*"I provide my Realtors® with good leads, and also invest in tools to help my agents generate more, and better qualified leads from their marketing efforts."*

*"I don't have a Realtor® in your area that I'm doing this with currently... "*

*"All I was hoping to do today is chat with you for literally a couple minutes to learn more about your goals—what's working, what isn't—a few questions just to see if we're a good match."*

*"If so, we can setup another call or meet in person to discuss the details."*

*"So, how long have you been in the real estate business?"*

**Keep rolling. You don't need to ask for permission.**

You're going to ask the following open-ended questions. Get them talking about themselves (agents love doing that) and it's the perfect opportunity to learn more about how you can help them and uncover hot buttons.

Be an excellent listener. Take notes (plug them into your CRM) and look for ways to help them.

### **Good WHALE Hunting: Open Questionnaire**

You can print this questionnaire up and take it with you if you're meeting with an agent in person.

If you do that, you're going to want to get the rest of the script memorized as much as possible.

It's money. Literally. I've tested it. My mortgage clients have used it with great success. Anyone that's decent on the phone can literally take your agents from you with it, so try it out before someone else uses it on your agents.

Keep in mind: real estate agents (and people in general) love to see others taking notes as they speak, but you don't want to be reading the whole script in front of them. 😊

Once you get the answers from the agent, add them to your CRM or spreadsheet, combining their answers with your original research from the Eligibility Checklist.



**OPEN QUESTIONS --**

**1. What kinds of clients do you like to work with?**

Buyers | Sellers | Investors | Expired | FSBO | Military | Relocation | Luxury | Other

Notes: \_\_\_\_\_

**2. What's your main website address?**

\_\_\_\_\_

Any other websites? Y | N

Notes: \_\_\_\_\_

**3. How many visitors do you get to your website each month?**

\_\_\_\_\_

**4. What kind of digital marketing are you doing?**

Email | Blog | Social | PPC | SEO | Video | Other

Notes: \_\_\_\_\_

**5. What kind of traditional marketing are you doing?**

Mailers | Magazines | TV | Radio | Other

Notes: \_\_\_\_\_

**6. Of all your marketing efforts, what's currently working best for you?**

\_\_\_\_\_

**7. How many open houses are you doing each month?**

\_\_\_\_\_

**8. How many listings do you have?**

\_\_\_\_\_

**9. What are some of the challenges you face in your business?**

\_\_\_\_\_

**10. On average, how many transactions are you closing per month?**

\_\_\_\_\_



**11. What's your goal—where would you like to be?**

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**12. What are some of your other LOs doing to help you with marketing and lead generation?**

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**OPEN SCRIPT CONTINUED (after the questions) --**

*"Great \_\_\_\_\_, thanks for sharing. This is all really good stuff."*

*"Based on your answers, I definitely think this is going to be a good fit."*

*"In a nutshell: I use the same technology and strategies that some of the most successful companies out there are using to generate qualified buyer and seller leads..."*

*"I share these leads with my exclusive Realtor partners, and I also set up my preferred agents with tools and strategies so that you can get better results and generate more leads from your marketing."*

*"It's the same stuff the big boys —Zillow, Trulia, Realtor.com, Homes.com, Quicken Loans, LendingTree—are using to convert website visitors and anonymous clicks into actual leads."*

*"And the best part is: they're exclusive."*

*"You can't sell houses to a bunch of clicks, right?"*

*"Without the right lead capture technology, driving a bunch of traffic through online marketing, SEO, social media, traditional marketing efforts, etc. doesn't do anything for you."*

*"That's like running the A/C but leaving all the windows down! You end up losing a lot of opportunities."*

*"Great, \_\_\_\_\_, well the solution I'm offering can fix that for you."*

*"I've also got some powerful tools to help with listing presentations, which, if you're interested, we can discuss more on our next call/meeting."*

*"It's not going to cost you anything, and based on everything you've told me today..."*

**"AS LONG AS YOU CAN SELL..."**

*"I can pretty much guarantee that I can help you generate additional business."*

*"So, \_\_\_\_\_, if that sounds good, I'd love to set up an appointment to show you exactly how it works and explain everything in more detail."*



**3 ACTION ITEMS TALK SUMMARY --**

**1. What the most successful companies in the industry are doing to generate quality leads from their marketing efforts.**

**2. How they (your Realtors) can use the same technology and strategy in their marketing efforts.**

**3. A guaranteed increase in their marketing R.O.I., qualified leads, and referrals.**

Remember to sprinkle in some additional strategic open-ended questions along the way and get them talking about their business.

Plant seeds of value. Uncover hot-buttons and pain-points, and get them talking and thinking about the fact that, for the most part, the other loan officers they work with aren't doing ANYTHING to help them generate business.

While other LOs are waiting on Realtors to send them referrals, or at best bringing them coffee and donuts, you're actually investing time and money into helping your agents generate more business.

**SET THE SOLID APPOINTMENT!**

Additional Notes: \_\_\_\_\_

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