



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

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

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

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

### **OPEN SCRIPT --**

*"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."*

*"I'm sure most of them are good 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 it's a one way street..."*

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

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

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

*"As I mentioned, I found you on \_\_\_\_\_ and liked what I saw, so I decided to reach out."*

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

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

*"A few minutes is all we need today."*

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

### **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?**

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Any other websites? Y | N

Notes: 

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

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

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

Notes: 

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

Mailers | Magazines | TV | Radio | Other

Notes: 

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

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

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

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

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

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**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 generating business?**

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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 mortgage and real estate leads..."*

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

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

*"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..."*

**"IF 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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