



Create future closings: How to keep tabs on your VIPs

Provide yourself a clear path to success by focusing on anticipated listings and clients, along with your most active referral partners. Start filling up your whiteboard today, add value to the names on your board, and watch your business flourish

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Sometimes you have to see something before it can become something. Visualizing your [future listings](#) and buyers helps create clarity in your business. Clarity helps you build daily activities and systemized follow-up activities that lead to success.

I use a whiteboard in my office to keep a visual understanding of where my next 10 listings might come from, who my next 10 buyers might be and who my top 10 referral partners are. Having this whiteboard on the wall of my office where I can see it all day helps me stay focused on my highest-priority clients.

Early in my career, I didn't always have 10 names in each group. This gave me the ability to focus on the areas of my business where I had gaps that needed to be filled in order for my business to stay consistent and [to grow](#).

As my business grew, there were times when I had 15 to 20 names in each group. But throughout my career, as long as I had my whiteboard filled with anticipated listings, buyers and my top 10 referral partners, my business stayed healthy and thrived.

My whiteboard includes the three different groups of people I mentioned above with specific details on each group, which I will discuss in depth below.

Next-10 list for future listings

The next-10 list of future listings includes homeowners who've indicated they planned to sell in the near future. I put their names on the board, an estimated time when they mentioned they would sell, bedrooms/baths/square footage, an estimated listing price and last date of [communication](#).

The estimated listing date gives me an idea of when I should increase my communication as the estimated listing date nears. The size of the home and bedroom/bath information helps me remember it in case I find a buyer who might be a fit for the home, prior to the listing date.

The estimated listing price gives me the ability to forecast my business by the listings I expect to take and to keep that price range top-of-mind as I see sales activity for comparable homes. The last date of communication ensures that my estimated next 10 listings received consistent [personal](#) communication.

Here's an action plan.

1. Systematic property updates

I set each homeowner up on a systemized plan that automatically emails them when a property like theirs comes on the market, goes under contract or sells. This can be done through [your CRM](#), and most MLS systems have the capability as well.

The ability to automatically inform them about comparable home sales activity shows the client you are thinking of them and sets you up as the trusted resource.

2. Personal touches each week

I constantly review the portion of the white board where I posted the last communication to make sure there was at least one personal touch from me each week.

That communication consists of a mix of phone calls, text messages, video emails and [handwritten notes](#). Here are a few examples of each of these personal communications.

Phone calls

Here are a few examples of phone calls:

It has been a few weeks since we spoke on the phone. I wanted to check in and see if anything has changed or if 3 months from now is still your timetable for getting your house sold.

I wanted to make sure you saw the email I sent with details on the home on your street that sold today.

There are a couple interesting shifts we're seeing in the market right now, and I wanted to update you on how they might affect the sales price or length of time it might take to sell your home.

Text messages

Here are a few examples of text messages:

I wanted to make sure you're receiving the emails I'm sending with the sales activity of homes like yours. I don't want to overwhelm you, but I do want to make sure I'm providing the information you want and need.

Should I make any modifications to the frequency of emails or types of properties I'm sending?

I saw your post on Facebook about (whatever they posted). Congrats!

I'm not sure if you saw my email, but there are now two homes for sale in your neighborhood. If you're curious about how these homes being on the market might affect yours, feel free to give me a call.

Video emails

I utilize BombBomb to send personalized [video emails](#). Some of these are similar to the messaging mentioned above but delivered in a different and more personalized way via video.

I also use the screen-share option where I would still be visible in a corner of the email, but I could share my screen to go over specific information. These [screen-share videos](#) include details of a comparable home that came on the market, sales details of comparable home sales and historical sales data that affects their home.

Hand-written notes

Hand-written notes are a personalized way to show gratitude or recognize life events. I utilize hand-written notes to thank clients for meeting with me and to offer congratulations for life events like family weddings, the births of children or achievements at work such as promotions or recognition.

Personalized communication deepens the relationship and helps you to stay top-of-mind.

3. Monthly updates on the local real estate market

I send each person on my next 10 listings a personalized video email at the end of each month going over the current market environment and how it affects their home.

These are short videos that cover the average sales price for the market versus the previous month, the number of homes on the market versus the previous month, and the average days on market versus the previous month. I also share a brief explanation of how these statistics could affect the sale of their home.

4. CMAs every 3 months

I send the homeowners on this list a personalized, updated CMA every three months. I used written CMAs for many years, but when I shifted to delivering the CMAs via video, the results increased dramatically.

The video CMA includes the comparable homes that sold in the past three months and an updated estimation of what their home would bring in today's current market environment. Each of these includes a range of values instead of a single valuation.

In the video I always say:

"I'm giving you an estimation because it has been a few months since I've been inside your home. I'm not sure if you've made any improvements since I last saw your home, but if you would like a more precise estimate of your home's current value, I can give you that number in less than 5 minutes, once I walk through your home. Give me a call if you'd like to set a time for me to walk through."

These [automated](#) and systemized plans of communication give me the best opportunity to secure the listing of these homes when the homeowners are ready to sell.

Next-10 list for buyers

The next 10 buyers list is the second group on my whiteboard. This portion of the whiteboard included the buyer's names, their time frame for purchasing, the price range they were looking for and the last date of communication I had with them.

Here's an action plan.

1. Systematic emails of new listings and price reductions

Just as I do with the next 10 listings, I set each buyer up to receive automated emails when properties that meet their desired criteria either come on the market or have [price reductions](#).

The criteria I set for them included the price range they were qualified to buy, the location they desired, the number of bedrooms/baths they required and any amenities they requested.

I schedule these to be emailed immediately when they come on the market if the buyers have a timeline of three months or less. If their time frame to buy is more than three months, I automate the emails to go out once a week.

2. Personal touches each week

Phone calls

Here are a few examples of phone calls:

It has been a few weeks since we spoke on the phone, so I wanted to check in and see if anything has changed or if three months from now is still your time table for finding the perfect home for you to buy.

I wanted to make sure you saw the home I emailed over to you that just came on the market at (address). It seems to have a lot of the features you mentioned you wanted. Would you be interested in seeing the house at (address)?

There are a couple of interesting shifts we're seeing in the market right now, and I wanted to update you on how they might affect the buying process for you.

Text messages

Here are a few examples of text messages:

I wanted to make sure you're receiving the emails I'm sending with the properties coming on the market or with price reductions. I don't want to overwhelm you, but I do want to make sure I'm providing the information you want and need. Should I make any modifications to the types of homes, frequency of emails, or types of properties I'm sending?

I saw your post on Facebook about (whatever they posted). Congrats!

Interest rates rose/fell 0.25 percent over the last few weeks. Based on a loan amount of (whatever amount they would be borrowing) this would mean a difference of \$x per month and \$x over a 30-year mortgage. If you're curious how we can take advantage of this reduction (if rates went down) or (if rates went up) mitigate any future risk of rates going higher, give me a call.

Video emails

I utilize BombBomb to send buyers overviews of properties as they come on the market.

I keep the MLS sheet and photos pulled up, and I also show them an aerial view of the home from the local property appraiser's website. This aerial view gives me the ability to show them where the home is located in relation to schools, shopping or other attractions.

3. Monthly updates on the local real estate market

I send each potential buyer on my next-10 list a personalized video email at the end of each month going over the current market environment, interest rates and how these factors affect their buying opportunities.

These monthly updates are always followed with a phone call to see if the time frame for purchasing has changed.

Top 10 referral partners

The top 10 referral partners group consists of people who had sent me referrals in the past, past clients that could be future referral partners, and raving fans that spread the message that I am their agent of choice. I keep their name and last date of communication on my white board.

The action plan for my top 10 referral partners includes:

1. Personal touch once a month

These personal touches include phone calls, text messages, video emails and commenting on their [social media](#) posts. I want to make sure I have personal contact with them at least once a month.

The communication with this group is more personal than business. I work to deepen our personal relationship and not just our business relationship. I ask more about their family, their passions and their work. Each time I connect with this group, I update the last date of communication on the white board.

2. Systemize property updates

Most of the people in this group own homes, so I have the automated system from my website email them every two weeks with properties like theirs that came on the market, went under contract or sold over the previous two weeks.

While the touches mentioned above were more personal, these automatic emails reminded them that I was in the real estate business.

3. Unexpected surprises

The best way to reinforce our desired behaviors is by saying “thank you” for [referrals](#) or keeping us in mind when the opportunity presents itself to refer someone to us. I regularly surprise my top 10 referral partners with gifts.

I try to have something at least every two months, but I also thank them immediately after they refer someone to me. Here are a few ideas on how to surprise this group:

- Make a donation in their name to their favorite charity.
- Provide them with a gift card to their favorite restaurant.
- Send them a “home-iversary” cake on the anniversary of the purchase of their home.
- Give them sporting event tickets, concert tickets or movie tickets.

When you surprise them with rewards for sending you referrals, they will surprise you with more referrals.

Provide yourself a clear path to success by focusing on your most likely to sell or purchase clients, along with your most active referral partners. Start filling up your whiteboard today, add value to the names on your board, and watch your business flourish.