

GENERATE LEADS AND CLIENTS

**COMMERCIAL
REFERRAL
TEMPLATES**

PHONE AND EMAIL SCRIPTS





Generate Commercial Referral Leads For Commercial Business Using These Templates

This Cheat-Sheet template will show you what to say on the phone and in email form to generate referrals for 2 main purposes:

- #1) Direct commercial real estate leads to fill your normal business funnel. (The business you actually want to practice.)
- #2) Indirect commercial real estate leads to fill you passive income funnel. (The business you want to refer out to commercial agents and receive referral fees upon closing.) You don't have to be a commercial agent to profit from commercial real estate!

**Swipe and deploy these scripts in your business. Use them "as-is" or
Modify them. Internalize them. Make them work for you!**





Script one: Calling for direct referrals

“Hi ___(name)___! How are you today?”

Short minute or two on catching up (this time will depend on your relationship with them). This could last 1 minute or 10 minutes, maybe more. Pick the most relevant topic to start with. Remember the acronym FORD? Family, Occupation, Recreation, Desires.

Also note what personality type the person you are speaking with. Let's take the DISC test personality method for example. If they are a D (Driver), then you will not want to spend much time if any in this section. If they are an I-type (Influencing), you'll want to spend more time in this first rapport building section. With S-types (Stability), I have found they are more like the I's and are open to longer personal intros to re-freshen up the relationship. And lastly the C-type personality (Compliant) will generally only need a short bit of catching up, if any. They are very similar to the D's.

Migrate to the business: “___(name)___, the reason for my call today is about business. As you know, I am a real estate agent/broker with _____Company... But I don't believe I've shared with you that I specialize in _____(insert value statement here)_____.”

The ask: “___(insert qualifying statement here)___”. Continue on with OR start with... “Do you know of one person who currently owns ___(property type)___ or has mentioned interest in owning ___(property type)___?”

*Qualifying statement: If the person may be in a like industry, tie the conversation to that. example, if they are a mortgage officer, home inspector, business owner, executive, etc.

YES: “That is fantastic. Would it be possible for you to make an introduction?” If you can sense resistance in them making an introduction, then it's time to down-sell. Ask for an email or phone number for the contact and ability to mention his/her name. If they are still uncomfortable, ask them directly what they think the best method would be for referring them to you.

NO: “hey, no worries at all. If you do come across someone or remember someone later on would you mind giving me a call? I would really appreciate it. You have my cell phone number, right?”

___(name)___ I appreciate your time helping me out with this. Most of my clients are referrals from friends like you, and it really means a lot. Is there anything I can do or help you with today?”

YES: Help them

NO: “If you need a resource for anything real estate, please let me know. I don't practice all types of property but I have a network that handles and knows just about every type out there. If I can help with any questions or find the right professionals to refer, please don't hesitate to contact me.”

Thank them and end the call

Follow up with an email to them. If you don't have their email, message on Facebook or Linked in or other media source thanking them for the call. Now they have your contact email and phone.



EXAMPLE Script one: Calling for direct referrals

“Hi Jake! How are you today?”

(Short minute or two on catching up) “I’m happy to hear that all is well with you”.

Jake, the reason for my call today is about business. As you know, I am a real estate agent with ABC Realty ... but I don’t believe I have shared with you that I specialize working with individual and small family investors in the Houston marketplace to grow their wealth and investment cash-flow with low rise apartment and mixed use buildings from 5-50 total units.

As an insurance specialist, you might have investor clients with 5-50 unit apartment buildings. Do you know of one person who currently owns apartment or wants to own apartments? (pause for reply)

YES: “That is fantastic. Would it be possible for you to make an introduction?” (pause for response). **YES I do actually but I’m uncomfortable giving their number out.** No worries Jake, you’re not alone on that. Is there a way you would feel comfortable reaching out to them? **Um, well... I could send them and email and CC you. Would that work?**

NO: “Hey, no worries at all. If you do come across someone or remember someone later on would you mind giving me a call? (pause for response, they will say yes) I would really appreciate it! You have my cell phone number and email, right?”

Jake I appreciate your time helping me out with this. You know most of my clients are referrals from friends like you, and it really means a lot. Now, is there anything that I can do or help you with today?”

YES: (Help them with whatever it is)

NO: “If you need a resource for anything real estate, please let me know. I don’t practice all types of property but I have a network that handles and knows just about every type out there from houses to industrial to land, etc. If I can help you with any questions or find the right professionals to refer, please don’t hesitate to contact me.”

It was nice catching up with you Jake. Have a great day and I’ll talk to you soon



Script 2: Calling for indirect referrals

“Hi ___(name)____! How are you today?”

Short minute or two on catching up (this time will depend on your relationship with them). This could last 1 minute or 10 minutes, maybe more. Pick the most relevant topic to start with. Remember the acronym FORD? Family, Occupation, Recreation, Desires.

Migrate to the business: “___(name)____, the reason for my call today is about business. As you know, I am a real estate agent/broker with _____Company... which I specialize in residential homes and estates, but many of my clients have investment property or are business owners/executives with commercial needs. I have recently built a strong team of excellent agents that specialize in the various forms of commercial real estate such as_____(what types of referrals you want)_____.”

The ask: “___(insert qualifying statement here)____”. Continue on with OR start with... “ Do you know of one person who currently owns ___(property type)____ or has mentioned interest in owning ___(property type)____?”

*Qualifying statement: If the person may be in a like industry, tie the conversation to that. example, if they are a mortgage officer, home inspector, business owner, executive, etc.

YES: “That is fantastic. Would it be possible for you to make an introduction?” If you can sense resistance in them making an introduction, then it’s time to down-sell. Ask for an email or phone number for the contact and ability to mention his/her name. If they are still uncomfortable, ask them directly what they think the best method would be for referring them to you.

NO: “hey, no worries at all. If you do come across someone or remember someone later on would you mind giving me a call? I would really appreciate it. You have my cell phone number, right?”

___(name)___I appreciate your time helping me out with this. Most of my clients are referrals from friends like you, and it really means a lot. Is there anything I can do or help you with today?”

YES: Help them

NO: “If you need a resource for anything real estate, please let me know. I don’t practice all types of property but I have a network that handles and knows just about every type out there. If I can help with any questions or find the right professionals to refer, please don’t hesitate to contact me.”

Thank them and end the call

Follow up with an email to them. If you don’t have their email, message on Facebook or Linked in or other media source thanking them for the call. Now they have your contact email and phone.



Example Script 2: Calling for Indirect Referrals

“Hi Suzie! How are you today?”

(Short minute or two on catching up) “I’m happy to hear that all is well with you”.

Suzie, the reason for my call today is about business. As you know, I am a real estate broker with Luxury Real Estate Company... which I specialize in residential homes and estates, but many of my clients have investment property or are small business owners with commercial real estate needs. I have recently built a strong team of excellent agents that specialize in the various forms of commercial real estate such as apartment buildings and retail shopping centers.”

Do you know of one person who currently owns apartment or wants to own apartments? (pause for reply)

YES: “That is fantastic. Would it be possible for you to make an introduction?” (pause for response). **YES I do actually but I’m uncomfortable giving their number out.** No worries Suzie, you’re not alone on that. Is there a way you would feel comfortable reaching out to them? **Um, well... I don’t have their email but I can send them a Facebook message and tag you. Would that work?**

NO: “Hey, no worries at all. If you do come across someone or remember someone later on would you mind giving me a call or email? (Pause for response, they will say yes) I would really appreciate it! You have my cell phone number and email, right?”

Suzie I appreciate your time helping me out with this. You know most of my clients are referrals from friends like yourself, and it really means a lot. Now, is there anything that I can do or help you with today?”

YES: (Help them with whatever it is)

NO: “If you need a resource for anything real estate, please let me know. I don’t practice all types of property but I have a network that handles and knows just about every type out there from houses to industrial to land, etc. If I can help you with any questions or find the right professionals to refer, please don’t hesitate to contact me.”

It was nice catching up with you Suzie. Are you available for lunch next week, say Wednesday? I’d love to catch up more with you.



Script 1: Emailing for Direct Referrals

Hi (___name___),

Long time no see! Hope all is going fantastic for you.

Migrate to the business: “The reason for my email today is about business. As you know, I am a real estate agent/broker with _____ Company. Yet, I don’t believe I’ve shared with you that I specialize in _____(insert value statement here)_____.”

The ask: “___(insert qualifying statement here)___”. Continue on with OR start with... “I’m trying to grow my business and was hoping you might be able to help me out with a small favor? Do you know of one person who currently owns ___(property type)___ or has mentioned interest in owning ___(related property type)___that I may be able to speak with?”

I appreciate your time ___(name)___



Example Script 1: Emailing for Direct Referrals

Hi Mark,

Hope all is going fantastic for you. It’s been too long since we went to sushi!

Although we need to do sushi again, the reason for my email today is about business. As you know, I am a real estate agent with Big Time Realty Corp. Yet, I don’t believe I’ve shared with you that I specialize in commercial investment properties.

I’m trying to grow my business and was hoping you might be able to help me out with a small favor? Do you know of one person who currently owns commercial property such as an apartment building or has mentioned interest in owning commercial real estate that I may be able to speak with?

I really appreciate your time Mark. Have a great Thursday!

-Samuel

P.S. If I can help you with any real estate questions or advice please don’t hesitate to reach out!



Script 2: Emailing for Indirect Referrals

Hi (___name___),

Long time no see! Hope all is going fantastic for you.

Migrate to the business: “The reason for my email today is about business. As you know, I am a real estate agent/broker with _____Company and I am focused on primarily residential homes and estates. Yet many of my clients have investment property or are business owners/executives with commercial needs. In response, I have recently built a strong team of excellent agents that specialize in the various forms of commercial real estate such as _____(what types of referrals you want)_____.”

The ask: “___(insert qualifying statement here)___”. Continue on with OR start with... “I’m trying to grow my business by providing more value to my existing clients and to new clients and was hoping you might be able to help me out with a small favor? Do you know of one person who currently owns ___(property type)___ or has mentioned interest in owning ___(related property type)___ that I may be able to speak with?”

I appreciate your time ___(name)___



Example Script 2: Emailing for Indirect Referrals

Hey Will,

Hope all is going fantastic for you and your family. I still hope you are still loving your home on Swallow Lane. I can’t believe it’s already been 3 years!

The reason for my email today is about business. As you know, I am a real estate agent with EZ Realty Corp and I primarily specialize in residential homes and duplexes/triplexes, but many of my clients have larger investment property or are small business owners with commercial real estate needs. In response, I have recently built a strong team of excellent agents that specialize in the various forms of commercial real estate such as larger apartment buildings and commercial investment properties.”

I’m trying to grow my business and was hoping you might be able to help me out with a small favor? Do you know of one person who currently owns commercial property such as an apartment building or has mentioned interest in owning commercial real estate that I may be able to speak with?

I really appreciate your time Will. Have a great Thursday!

-Samuel

P.S. If I can help you personally with any real estate questions or advice please don’t hesitate to reach out!