

# REFERRAL CALL SCRIPTS



## **OVERVIEW:**

For real estate agents, referrals can be the difference between a life spent chasing leads and one spent doing more of the things you love.

**Print out these call scripts and use them to reach out to past clients—opening the door for you to connect with new ones.**

## **WHAT'S INCLUDED:**

- **Referral Call Scripts**  
*Strategies for following up and garnering referrals.*



# Script #1: Long-Time Client

**Your most valued clients (whom you've known for years or worked with multiple times) are among the best sources for new deals. Start by calling one of those clients and asking how they've been.**

*"Hi [client's name], how are you? This is [your name], and I wanted to touch base and see how your [summer/spring/business] is going."*

When you've kept in touch with a valued client—either through multiple transactions or regular touchpoints—your conversations won't always be about business. Record personal information about clients in your CRM so you can ask questions about things they really care about.

*"The last time I talked to you, you were [planning a vacation/getting ready for your child's graduation/taking up a new hobby]. How did that go?"*

The topic of conversation will vary, but the goal here is to connect with your client on a human level. In the same way you wouldn't call up a friend or family member and immediately ask them for a favor, you don't want to prematurely ask your client for a referral.

The next thing you should do is to show gratitude for your client and offer value.

*"It's been great catching up with you, [name]. While I have you on the line, I just wanted to let you know how much I appreciate having you as a client. If there's anything I can ever do for you, please don't hesitate to ask."*

Once you've had a meaningful conversation, focused entirely on your client, you can transition into asking for the referral.

*"Since you're one of my most valued clients, and I'm always looking to work with more people just like you, I was wondering if you'd be able to help me out. Do you know anyone looking to move in the near future, who might need an agent?"*

If you have a goal you're looking to achieve this year, this would be a great time to bring it up. Doing so will help your client connect with you and feel like they're a part of your success.

*"My goal this year is to help [number] clients buy the home of their dreams. Do you know of anyone who I could help?"*

If your client can't think of anyone, thank them for their time, and ask them to keep you in mind if a friend, neighbor, or family member plans to move. If your client does know someone, here's where you ask for an introduction.

*"I'd be glad to help [prospect's name] out! Would you be willing to put me in touch with them? I'm sure your recommendation would go a long way."*

This is a great way to ask for a referral, because you're emphasizing how important your client's endorsement is. You're also triggering the reciprocity effect, which will increase the odds they will follow through.



## Script #2: Recently Closed Deal

If you've got a client you've recently done business with, you've got a built-in opportunity for a follow-up call. A couple months after closing day, try following up with a buyer client and having a friendly conversation.

*"Hi [client's name], how are you? This is [your name], and I wanted to congratulate you [and spouse/partner's name, if applicable] again on your new home! How is everything working out with your new place so far?"*

Be sure to pay close attention to what your client says next, as that will dictate the tone of the conversation. For example, if your client is stressed or feeling especially overwhelmed, now is probably not the time to ask for a referral. Instead, offer words of reassurance, such as:

*"I understand. New homes can be a lot of work, and you're definitely not alone feeling that way. But owning a home is an amazing thing, and I think you'll find it's worth all the headaches and stress."*

Whether they're over the moon or having a touch of buyer's remorse, matching your client's tone is crucial. Here are some things you might say, depending on their current frame of mind:

*"I'm so glad to hear it! I know you're going to make so many great memories in your new place."*

*"I hear you. It's nice to have some time to just relax after the stresses of moving."*

*"I hope you find some time to do a little something for yourself, once things have settled down a bit."*

Next, pivot to expressing gratitude and offering value.

*"I know you're busy, and I want to thank you for taking the time to talk to me today. If there's anything you need, like the name of a contractor or even just a great place to go get dinner, let me know. You were awesome to work with, and I really appreciate you trusting me with your business."*

From there, you can bring the conversation to the topic of referrals.

*"I'm always looking for more great clients like you. If you know anyone else who's looking to buy or sell, I'd definitely like to help them, too!"*

This gives your client an opportunity to give a name, but, more important, it plants the idea in their mind that you'd appreciate a referral at any time. When they inevitably know someone who's planning a move, they'll be more likely to think of you.



## Script #3: One-Year Anniversary of a Home Sale

**If you're hoping to leverage past clients for more business, it pays to follow up at regular intervals. In addition to birthdays and holidays, one of the best times to reach out is one year after closing.**

*"Hi [client's name], how are you? This is [your name], and I wanted to congratulate you [and spouse/partner's name, if applicable] on the anniversary of buying your home! It's hard to believe settlement was a whole year ago today."*

With this simple introduction, you're transporting your client back to one of the happiest days of their lives, and reminding them of the pivotal role you played in getting them into their home.

*"It was an honor being there for such a big moment in your life. I'm grateful for your business, and I'm here to help you with anything you need in the future."*

Before you say your goodbyes, remind your client how valuable referrals are to you, and get them invested in your success.

*"This year, I've set some big goals for myself. I'm looking to help [number] clients buy the home of their dreams. If you happen to know anybody who's looking for a home, please send them my way!"*

From there, keep in touch with your client regularly and see if there's anything they need help with. Try sending them an item of value to stay top of mind. Speaking of which...



## Script #4: With a Little Help from Your Magazine

Another referral strategy is to follow up after sending your customized magazine from ReminderMedia. For example, two weeks after your magazine's holiday edition goes out, you can call a client to see how they liked it.

*"Hi [client's name], how's it going? It's [your name]. I was just calling to see how you're doing, and whether you've had time to check out the gift I sent you. I really liked the article about [subject] and thought you might enjoy it, too."*

From there, you can organically talk about the article you're referring to, based on their response. Or, if they haven't yet read it, explain what you enjoyed about the article, and why you thought they would enjoy it as well.

Finally, make sure to tie everything together in a way that will both remind your client of the value you offer and encourage referrals.

*"I hope you're enjoying the magazine and finding the articles and recipes useful. It helps me keep in touch with important people in my life. Is there anyone you know who might like a copy—maybe someone who's looking to buy or sell a house in the next year or so?"*

If your client gives you contact information for someone in their circle, you can add them to your mailing list and begin nurturing a new relationship. And, if not, remind your current client how valuable referrals are to you.

*"If you think of anyone else who might need my services, please send them my way. I'm always on the lookout for great customers like you."*

Ultimately, your past clients are your best source for new transactions. Treat them well, follow up frequently, and don't be afraid to ask them for referrals.