



**BERKSHIRE
HATHAWAY**
HomeServices
California Realty

Relocation / Fee Referral Agent Self Assessment

Please take a moment to answer the following questions to the best of your ability. BHHS CA Realty is currently expanding our reach to new clients both within our service areas and beyond to a National and Global audience. The purpose of this short survey is to identify agents in the following categories:

1. Existing Professional Realtors looking to increase both Core and Fee Referral business (explained below).
2. Existing Professional Realtors looking to develop a Core Referral strategy.
3. New Professional Realtors (0-6 months in business) looking to increase both Core and Fee Referral business.

If you will please take 7-10 minutes to fill out this survey, I will provide you feedback and requested resources within 7 days of receipt. I'll include actionable items that you can immediately integrate into your existing business and if you'd like, set a time to talk in-person about increasing your referral business.

Key definitions:

Core Referral = Referred client from: Your known advocates, your past/present clients, Local Affinity partners & your sphere of influence.

Fee Referrals = A client received or given to another specific licenced agent (broker-to-broker and Relocation Management Companies included) in which one or more of the parties receives a "referral fee" out of the Gross Commissions at closing. (Does not include "pay per lead" services.)

CRM= Client Relationship Manager / Database (not just a contact list, but that's a start!)

Thank you in advance for your effort, honesty and candor.

Todd Ridgway

Todd Ridgway
Director of Relocation
BHHS California Realty

Agent / Team Name _____

Office Location: Riverside ____ Moreno Valley ____ Redlands ____ Beaumont ____ Corona ____

Cell _____ Email: _____

Personal Website _____

1. Years Licensed: _____
2. Years with BHHS CA Realty: _____
3. I have completed the **BHHS rCertified Training** in the BHHS Resource Center: Yes ___ No ___
4. I am a: Full Time Agent _____ Part Time Agent _____ New Agent (0-6 Mo.) _____
5. I have a Business Plan in WRITING: Yes ___ No ___
6. I have Set 2020 goals and have a system to track them: Yes ___ No ___
7. Closed Production:
 - 2018 - # of Listing Sides _____ # of Buyers Sides _____
 - 2019 - # of Listing Sides _____ # of Buyers Sides _____
 - 2020 - # of Listing Sides _____ # of Buyers Sides _____
8. I use a TC: Yes ___ No ___
9. I use a Database/CRM: Yes ___ No ___ If Yes, provider: _____
 Please Check all CRM strategies that you currently employ:
 QTRLY/MONTHLY Newsletter Targeted / Segmented Blast Email Campaign
 Personal Milestone Campaign (Holiday, B-Day, Closing Anniversary) Client Pop Bys
 Client Appreciation Events Preferred Vendor / Provider List Special Offer Program
 Other: _____
10. I status my in-process clients. Daily _____ Weekly _____ Transaction Milestones _____
 Statuses are done: Phone ___ Text ___ Email ___ 3rd party Sys ___ Client Directed ___
11. I prefer communicating with clients and agents Via: Phone ___ Text ___ Email ___
12. I use written testimonials in my personal marketing campaign: Yes ___ No ___
13. I have or have had a business coach: Yes ___ No ___ How Long _____yrs

 Company Name: _____

Please rate yourself 1-10 in the following areas. 1= I can use some help, 10= I got this!!

14. I have a working system in place for: *Rate 1 through 10*
 Accountability Partner Goal Tracking In Process Tracking Budgeting
15. I have a reliable way to: *Rate 1 through 10* (non referral)
 Generate CORE Referrals Generate FEE Referrals Generate New Leads
 Refer Out-of-Market Leads Communicate Transaction Milestones ALL parties
 Obtain Quality Service Feedback and Testimonials Ask for Referrals (During/After)
 Track Expenses Send Closing Gifts/Thank you Resend Closing Est. - Tax Prep

16. I know where my next _____ (# of closings) are coming from.

17. I ask everyone I talk to about RE - "How did you hear about me?" Yes ___ No___

15a. I WRITE DOWN and track that information: Yes___ No ___

18. I use BUSINESS social media engagement: Daily ___ Monthly ___ When I think about it ___
___FaceBook ___ InstaGram ___ Twitter ___ Other:_____

19. I am doing the following now: (Please **CHECK** all current strategies that apply & **CIRCLE** if you'd like more information on what BHHS CA Realty has to offer on this strategy)

___ Database/ CRM

___ Core Referrals

___ FEE Referrals

___ Pay per Lead System

___ Social Media Engagement/ Content

___ Direct Mail

___ Traditional Farm

___ Virtual Farm

___ Client Newsletter

___ Education/Seminars/Webinars

___ High Conversion Scripts & Dialogues

___ Other _____

20. I have family / friends / co-workers that live out of the state or country: Yes ___ No___

21. I currently service Property Management Contracts: Yes ___ No ___
_____ % of my current business comes from NON-Sale transactions.

22. Please consider me for the Global Relocation Program: Yes ___ No ___

Thank you SO much for time! Your input means a great deal to myself and the company. I promise to have valuable feedback to you within 7-days of receipt.

Todd Ridgway
Director of Relocation
BHHS California Realty
951.329.9909
theRELOman@gmail.com