Lead Generation Sphere of Influence and Client Relationships

Build a consistent business development routine around people you know, useful advice, dependable service, and follow-through. Your sphere of influence can introduce you to future opportunities, but those relationships need attention long before anyone is ready to buy or sell.

This guide explains how to organize your contacts, maintain relationships, earn referrals, participate in your community, and review your activity. The central task is to make helpful relationship building a regular part of your work. Consistent effort supports future opportunities; it does not guarantee referrals or closings.

How to use this guide

Read each chapter, complete the practice activity, and compare your response with the suggested answer. Use a notebook and your approved customer relationship management system, or CRM. Adapt the sample language to your voice and the actual relationship. Finish by scheduling your first month and completing the planning worksheets.

Your route through the guide

1 Build relationships through useful service

2 Organize your sphere and database

3 Stay connected throughout the year

4 Protect time for the Daily Five

5 Plan and review your weekly and monthly activity

6 Earn referrals and handle introductions

7 Build professional and community relationships

8 Become a trusted advisor

Your first 30 days

Worksheets and progress review

What you will put in place

By the end, you should have a contact list with communication priorities, a practical follow-up calendar, a protected daily activity block, a referral response process, and a simple weekly review. These tools work together: the database remembers commitments, the calendar reserves time, and your conversations provide the personal attention.

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1 Build relationships through useful service

Lead generation creates opportunities for people to discover your work, ask for help, and introduce you to others. In the List n Show approach, relationships, visibility, service, reputation, and consistency work together. Your goal is to become someone people remember when they need real estate guidance.

Start with a useful contribution

Before contacting someone, consider what would make the conversation worthwhile for them. You might explain a local market change, answer a homeownership question, introduce a service provider, or simply reconnect over a shared interest. Help should respond to a real need rather than create pressure to transact.

For example, a neighbor mentions a roof repair. Ask whether a roofer contact would be helpful. If they accept, send the information you promised and check whether they received it. A useful introduction can strengthen a relationship even when the person has no plans to move.

Use visibility to support familiarity

People need to remember what you do before they can think of referring you. Personal calls, thoughtful messages, community participation, and educational posts can keep you visible. Familiarity creates an opportunity to earn trust; your conduct and competence determine whether that trust develops.

Use the Team Brokerage support

List n Show's Team Brokerage Platform provides transaction coordination, RBO transaction management, administrative systems, compliance support, broker oversight, and training. Learn the company workflow and use those resources so you can devote more attention to relationships, advice, negotiations, and client service.

Administrative support still requires your cooperation. Provide accurate information promptly, communicate client needs, respond to requests, and involve the broker when guidance is needed. Clients continue to rely on your judgment and communication throughout the relationship.

Choose consistency you can maintain

A small routine you complete each week is more useful than an ambitious campaign you abandon. Choose activities that fit your schedule and allow time for family, health, learning, and rest. As your business changes, adjust the routine while preserving its purpose: staying connected and keeping commitments.

Put it into practice

Identify three people you could help this week. Write one useful action for each, the reason it fits the relationship, and the date you will complete it. Include at least one action that has no immediate connection to a transaction.

Check your understanding

A contact appreciates your help but has no plans to move. Was the conversation unsuccessful?

Suggested answer: No. You provided useful service and strengthened a relationship. A transaction is not the only meaningful outcome of a conversation.

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2 Organize your sphere and database

Your sphere of influence, or SOI, includes people you know through family, friendships, work, school, neighborhood activities, community groups, professional relationships, and past transactions. Begin with who already knows you rather than trying to predict who will buy or sell this year.

Build your list in several passes

Review personal connections first, then former coworkers and classmates, neighbors, school contacts, clubs, faith communities, local businesses, and volunteer activities. Include attorneys, accountants, contractors, lenders, other agents, and past clients with whom you have real connections. A group directory alone does not establish a relationship.

Use categories to organize communication

- A contacts are strong relationships, such as close friends, family, past clients, and frequent referral sources. The company recommends connecting monthly.
- B contacts are established relationships, such as neighbors, business acquaintances, former coworkers, and community members. The company recommends connecting quarterly.
- C contacts are casual acquaintances, event contacts, and online relationships. Stay visible through relevant, welcome communication and develop the connection naturally.

These categories guide your attention; they do not rank people's worth. Review each relationship individually. A past client with a strong ongoing connection may belong in A, while another past client may prefer a lighter communication rhythm.

Keep records that support action

Record the person's name, available phone and email, relationship to you, preferred communication method, last conversation, and next action with a date. Add an address, birthday, home anniversary, interests, and relevant milestones when appropriate. Keep personal notes respectful and useful, and honor requests about communication.

A strong note describes a commitment: "Taylor asked for a market update before considering a move next spring. Send the requested information Thursday and ask when another conversation would be useful." This gives you a reason and a next step, rather than a vague reminder to call.

Update the database while details are fresh

After a conversation, record the relevant facts, promised information, referral source, and follow-up date. Correct outdated details when you discover them. A reliable database helps you remember people and act on what they actually said.

Put it into practice

Add or review 15 people in your CRM. Assign a communication category, confirm available contact details, and schedule a specific next action for five of them. These are practice targets, not additional company quotas.

Check your understanding

Should every past client automatically receive exactly the same communication?

Suggested answer: No. Consider the relationship, current needs, category, and preferences. Use the framework to plan thoughtful contact rather than send identical messages to everyone.

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3 Stay connected throughout the year

An effective follow-up system combines planned contact with responses to real events in people's lives. Calls, texts, coffee meetings, handwritten notes, useful updates, and community gatherings give you different ways to stay present. Choose the method that fits the person and the reason for reaching out.

Create a practical contact rhythm

Use monthly personal contact for A relationships and quarterly contact for B relationships as planning goals. The company also recommends weekly contact with current clients, quarterly contact with past clients, annual home anniversary and birthday recognition, and regular communication with referral sources.

These plans overlap. If a past client is an A contact, a monthly conversation can also fulfill that person's quarterly past-client check-in. One thoughtful interaction can serve several purposes. Current clients may need additional communication when decisions or deadlines arise; a weekly routine should not delay time-sensitive help.

Remember milestones naturally

A home anniversary offers a personal reason to check in: "Happy home anniversary. I hope you're enjoying another year in your home. Is there anything about the house or local market I can help with?" Include a market update only if it would be relevant and welcome.

Recognize birthdays, weddings, new jobs, retirement, or other milestones when appropriate to the relationship. Follow the person's lead on private matters. Record only details you can use respectfully and avoid making every personal greeting a request for business.

Bring people together

Client appreciation can be simple: a coffee gathering, ice cream social, holiday open house, community barbecue, shred event, charity event, or school supply drive. Choose an activity you can manage well and explain the purpose clearly. The experience should help people feel appreciated and connected.

Use social media as a relationship tool

Share market explanations, homeownership advice, community events, neighborhood information, and educational examples. Avoid constant self-promotion, political arguments, negative commentary, and criticism of clients or competitors. Get permission before publishing identifiable client stories, images, or personal details.

Ask whether each communication helps someone understand a question or take a useful next step. A post can maintain visibility, but direct conversation is still needed to understand an individual's situation.

Put it into practice

Plan the next four weeks of contact for three A contacts, three B contacts, and two past clients. Combine overlapping reminders, add relevant milestones, and identify one useful educational topic to share.

Check your understanding

Does posting a general update replace the need to speak with an active client?

Suggested answer: No. General visibility supports your presence, while personal communication addresses the client's specific questions, decisions, and next steps.

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4 Protect time for the Daily Five

Time blocking means reserving specific periods for the work you intend to complete. Plan relationship building alongside client meetings, showings, marketing, education, and business review. A protected appointment with your own business makes important work less dependent on spare time.

Use the company Daily Five framework

The name refers to five types of activity. The company recommends the following on each business day:

- 5 conversations through calls, coffee meetings, meaningful text exchanges, or video calls.
- 5 follow-ups with past clients, current clients, leads, or referral partners.
- 1 social media post that provides education, community news, market information, or useful advice.
- 1 database update containing relevant notes, dates, or referral information.
- 1 personal improvement activity, such as training, reading, practice, or market research.

A sent message is not automatically a conversation. Use a meaningful exchange as your working definition. A follow-up may also become a conversation; record the overlap consistently so your totals remain understandable. Completing the numbers should support service rather than encourage repetitive or unwelcome contact.

Adapt the sample day to your business

The company offers this example: 8 to 9 for planning; 9 to 11 for lead generation and SOI contact; 11 to noon for client follow-up; noon to 1 for lunch; 1 to 4 for consultations, showings, and listing appointments; and 4 to 5 for CRM updates, email, and planning. Evenings may include community activities, family time, networking, or events.

Treat this as an example rather than a required workday. If appointments occur in the morning, move the relationship block to another workable time. Reserve space for urgent client needs and establish a realistic stopping point so the plan remains sustainable.

Make the block easy to begin

Before the block starts, prepare a short contact list with the reason for each conversation and any information you promised. Afterward, record results and next steps. If an urgent matter interrupts you, reschedule unfinished work instead of letting it disappear from the calendar.

Put it into practice

Block the five activity types into your next business day. Choose the contacts in advance, prepare one educational post, and select a specific learning topic. At day's end, compare your plan with what you completed and identify one adjustment.

Check your understanding

Does the Daily Five mean five of every activity?

Suggested answer: No. It means five conversations, five follow-ups, one social post, one database update, and one improvement activity per business day as the company's recommended framework.

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5 Review weekly and monthly activity

Daily habits need a broader review so you can see whether they support your business and your clients. Weekly planning keeps you connected to people who need attention now. Monthly review helps you judge which activities deserve more time and which need to change.

Use the weekly planning goals

- Speak with 10 or more SOI contacts.
- Meet two or more people face to face.
- Attend one or more community activities.
- Publish one to three pieces of educational content.
- Follow up with every active client and review business metrics.

These are the company's suggested weekly goals. They work alongside the daily framework: SOI conversations can contribute to daily conversations, and educational pieces can be shared through daily posts. Do not treat overlapping activities as separate obligations to contact the same person again unnecessarily.

Turn open houses into continuing conversations

Open houses can create buyer and seller opportunities, neighborhood connections, and professional visibility. Listen to visitors' questions, provide useful information, and agree on an appropriate next step when they want help. Record the conversation and complete the follow-up you promised. Attendance alone does not tell you whether someone wants ongoing contact.

Review activity and outcomes separately

Each week, track conversations, follow-ups, appointments, buyer consultations, listing consultations, referrals, and SOI contacts. Each month, review contacts added, SOI conversations, referrals received, listings taken, buyers under contract, closings, marketing activity, and community involvement.

Activity measures show what you did. Outcomes show what developed. A month with many conversations and few appointments may call for better listening, a clearer offer of help, or more time for relationships to develop. Avoid assuming every conversation should become an immediate appointment.

Use accountability to improve the plan

Ask what you completed, what produced useful conversations, what commitments remain open, and what should change. Choose one adjustment you can test next week. For example, replace a poorly attended general event with individual meetings if those conversations better serve your contacts.

Review your capacity as well as your totals. Protect health, family, personal relationships, community interests, and rest. If the routine repeatedly exceeds your available time, simplify it and discuss priorities with your broker or business support resources.

Put it into practice

Create a weekly scorecard using the goals above and select three monthly outcomes to review. Define each measure so you will count it the same way each time. Schedule a recurring review appointment.

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Check your understanding

What should you do when activity is high but appointments are low?

Suggested answer: Review the quality, relevance, and follow-through of your conversations and consider timing. Use the information to adjust your approach rather than promise a fixed conversion result.

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6 Earn referrals and handle introductions

A referral carries the confidence of the person making the introduction. Someone is trusting you with a person they care about. Prompt responses, clear communication, and dependable service help protect both that trust and your own reputation.

Invite an introduction naturally

A satisfied client or an established relationship may welcome a simple invitation: "If you know someone who could use my help in the future, I would appreciate an introduction." Another option is, "I build my business through relationships and referrals. If someone asks you for a real estate professional, I would love to be considered."

Use language that fits the conversation, then give the person room to respond. A referral request should feel like an invitation. Continue to provide good service whether or not an introduction follows.

Make the first response useful

Thank the person who introduced you and clarify the best way to connect. Respond promptly to the prospective client, explain who you are, and ask what help would be useful. Do not assume a referral means the person has chosen you or is ready to transact.

Example: "Morgan suggested we connect because you're thinking about a move. I'd be glad to hear what you're considering and answer questions. What would be a convenient time to talk?" Use this only when it accurately reflects the introduction.

Protect the relationship as you follow through

Record the referral source, the date, the person's stated needs, and your next action. Keep commitments and communicate clearly. Acknowledge the introduction without sharing the prospective client's private plans or transaction details unless you have appropriate permission.

If the person is not ready to move, ask whether future contact would be helpful and agree on a suitable time. If they need expertise outside your role, involve the broker or an appropriate professional rather than trying to answer beyond your knowledge.

Stay connected with past clients

A closing begins another stage of the relationship. Continue with useful check-ins, home anniversaries, relevant market information, holiday messages, and community invitations that suit the person. The best reason to remain available is that homeownership questions continue after the transaction.

Put it into practice

Write your own referral invitation and first-response message. Then map the steps from receiving an introduction to completing the first promised action. Include where you will record the source and next contact date.

Check your understanding

A referral source asks whether their friend is selling because of a private family problem. How should you respond?

Suggested answer: Thank them for the introduction, but protect the friend's personal information. Keep any acknowledgment general unless the client has authorized a specific disclosure.

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7 Build professional and community relationships

Professional relationships grow through reliable work and respectful communication. Attorneys, lenders, accountants, contractors, insurance professionals, business owners, community leaders, and other agents may all become useful connections. Begin by understanding how you can work well together and help the people you serve.

Work effectively with attorneys and lenders

Attorneys value complete files, accurate documents, prompt responses, and professional communication. Respect their role and bring legal questions to the appropriate professional. Solve administrative problems you can address and involve the broker when guidance is needed.

Lenders need clear information about deadlines, contract changes, appraisal issues, and closing dates. Communicate changes promptly and coordinate through the approved transaction process. Avoid unrealistic promises about financing or timing. Reliable communication reduces surprises and helps everyone plan.

Maintain a useful service provider network

Build connections with contractors, electricians, plumbers, roofers, landscapers, home inspectors, and other relevant professionals. Pay attention to responsiveness, professionalism, respectful treatment of clients, and the actual experience of people who have used their services.

When someone requests a recommendation, explain the basis for the introduction accurately. Do not promise the provider's performance. Keep contact information current and revisit your list when you receive meaningful feedback. Your recommendations influence how clients judge your care and judgment.

Participate in the community with purpose

Choose a cause or organization you actually care about, such as a charity, civic group, chamber, school activity, youth sport, faith community, or volunteer program. Offer a contribution you can sustain. Repeated participation gives people a chance to know you through your actions.

A useful commitment might be helping with a recurring school supply drive or volunteering regularly at a local event. Listen, contribute, and follow through on responsibilities. Let business conversations develop naturally when appropriate rather than making participation conditional on referrals.

Choose depth you can sustain

A few dependable relationships can be more useful than a long list of people you rarely speak with. Schedule regular contact with professional partners, ask what is changing in their work, and share information that helps them serve clients. Continue to respect each professional's responsibilities.

Put it into practice

Select two professional connections to strengthen and one community activity you can support regularly. For each, write a useful contribution, a first action, and a realistic time commitment. Explain how you will judge whether the relationship is being served well.

Check your understanding

A lender asks you to reassure a buyer that approval is certain. What should you do?

Suggested answer: Avoid making a promise you cannot support. Direct financing questions to the lender, communicate verified information accurately, and involve the broker when needed.

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8 Become a trusted advisor

Your professional reputation develops through what people experience when they work with you. A logo or polished post can introduce your business, but honesty, useful knowledge, responsiveness, and follow-through give people a reason to recommend it.

Listen before you guide

A trusted advisor asks questions, listens carefully, explains choices, communicates honestly, and helps clients understand next steps. Ask what the person wants to accomplish, what concerns them, and what information would help. Tailor the conversation to those answers rather than delivering the same presentation to everyone.

For example, a homeowner who asks about prices may be planning a sale, considering renovations, or simply trying to understand the neighborhood. Ask what prompted the question before recommending a next step. Explain what you know, identify uncertainty, and follow through on any research you promise.

Make marketing educational

Help people understand the market, buying and selling processes, homeownership, neighborhoods, opportunities, and risks. A useful post might explain how a change in inventory affects available choices, with a clear description of the area and period discussed. Avoid implying certainty that the information does not support.

Before publishing, ask whether the communication answers a real question, uses accurate information, and offers a useful next step. Continue learning through training, market research, reading, and practice so your educational content reflects your actual knowledge.

Let social proof reflect real service

Reviews, testimonials, repeat business, referrals, and community involvement can help people assess your work. Use authentic experiences and approved sharing practices. Do not turn a positive client story into an unsupported promise about what every future client will achieve.

Handle difficulties as part of your reputation

When something goes wrong, listen, confirm the facts, communicate what you can do, and keep the person informed. Involve the broker or the appropriate professional when the issue exceeds your role. A missed commitment followed by silence can harm trust more than an honest explanation and a clear corrective step.

Think beyond the next closing

Consider what you want clients and professional partners to say about working with you. Translate those qualities into observable habits: respond when promised, explain decisions clearly, keep records accurate, and remain available after closing. Relationships and reputation develop through repeated conduct over time.

Put it into practice

Choose three qualities you want people to associate with your work. Write one observable habit for each and a recent example of where you could improve. Add one learning activity to your calendar that supports the improvement.

Check your understanding

What makes an agent a trusted advisor when they do not know an answer?

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Suggested answer: They acknowledge the limit, identify an appropriate resource, and follow through. Pretending to know can damage the confidence they are trying to build.

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Your first 30 days

Use this starter plan to turn the guide into a working routine. The weekly steps below are practice assignments. Keep the company's activity frameworks in view and adapt your calendar to actual client responsibilities and available time.

Week 1 Organize and reserve time

Review your existing database or start a master list. Add contacts from personal, professional, community, and past-client relationships. Assign communication categories, confirm useful details, and record next actions. Reserve a daily relationship block and a weekly review appointment.

Prepare the first week's conversation and follow-up lists. Choose a relevant learning topic and useful educational content. Confirm how you will use company administrative and transaction support so open tasks have clear ownership.

Week 2 Begin the communication rhythm

Work through the Daily Five framework and record completed activity. Reconnect individually with people you know, complete promised follow-ups, and update notes while conversations are fresh. Schedule current-client communication and upcoming home anniversaries or birthdays.

At your weekly review, compare planned and completed activity. Identify any recurring interruption and make one specific adjustment to the calendar. Check whether the communication is useful and welcome, as well as whether you completed it.

Week 3 Strengthen connections

Arrange face-to-face conversations, reconnect with professional partners, and participate in a community activity that fits your interests. Consider a manageable client appreciation idea. If you host an open house, plan the follow-up before the event and complete the commitments afterward.

Practice a natural referral invitation where it fits an established relationship. Review your response process so an introduction receives timely attention and a documented next step.

Week 4 Review and refine

Review contacts added, SOI conversations, referrals, appointments, listings, buyers under contract, closings, marketing, and community activity. Distinguish completed effort from outcomes that may take longer to develop. Choose one activity to continue, one to improve, and one to reduce or stop.

Schedule the next month before the current month ends. Review whether your calendar leaves enough time for active clients, relationships, learning, and personal life. A sustainable routine should be repeatable rather than dependent on an unusually quiet week.

Readiness check

Can you identify whom to contact next, why the contact is useful, what you promised, and when you will follow through? Can you explain how your daily work supports weekly goals and how you will review progress? If an answer is unclear, revise the corresponding record or calendar block.

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Lead Generation Sphere of Influence and Client Relationships

Worksheets and progress review

Contact and follow up plan

Name and relationship: _____

Category and preferred communication: _____

Last meaningful conversation and relevant need: _____

Promised action and completion date: _____

Next contact date and reason: _____

Weekly activity review

Week beginning: _____ Review appointment: _____

Daily framework completed on which days: _____

SOI conversations toward 10 or more: _____ Face to face meetings toward 2 or more: _____

Community activities toward 1 or more: _____ Educational pieces toward 1 to 3: _____

Every active client contacted: _____ Unfinished promises and next actions: _____

What created useful conversations: _____

One change for next week: _____

Monthly business review

Month: _____ Contacts added: _____ SOI conversations: _____ Referrals: _____

Listings taken: _____ Buyers under contract: _____ Closings: _____

Marketing and community activities completed: _____

What worked and why: _____

What needs to change and when: _____

Apply your judgment

Scenario 1: A past client is an A contact and has a quarterly check-in due. How should you schedule contact?

Suggested response: Use the monthly A-contact rhythm and include the quarterly review in a relevant conversation. Avoid duplicate messages simply to clear separate reminders.

Scenario 2: You attended an event and collected several names but made no follow-up commitments. What should you do?

Suggested response: Review the actual conversations and any communication preferences. Reconnect individually where appropriate with a useful reason; do not assume attendance established a client relationship.

Scenario 3: Your schedule is full of active-client work and your relationship block is repeatedly missed. What should change?

Suggested response: Review priorities, use available company support, and reserve a smaller realistic block. Reschedule unfinished commitments and protect personal time so the plan can continue.

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