

WEEK 1

MONDAY

Create a list of 30 targets, Realtors and lenders included. Work alongside your team to develop this list, and keep it handy to note/track your marketing activities and progress.

TUESDAY

Connect with lenders Use this day to CHECK IN with lenders. They are easily the most overlooked source of business. Even out-of-the-area lenders can open business with you, based on property location. Remember that their assistants and processors can sometimes direct deals. Pay attention to these folks.

WEDNESDAY

Prepare to be delighted Email a note to any customers who you have a NEW open order with. Use this email to introduce yourself and what level of service you provide. Maybe add a bio flyer as an attachment.

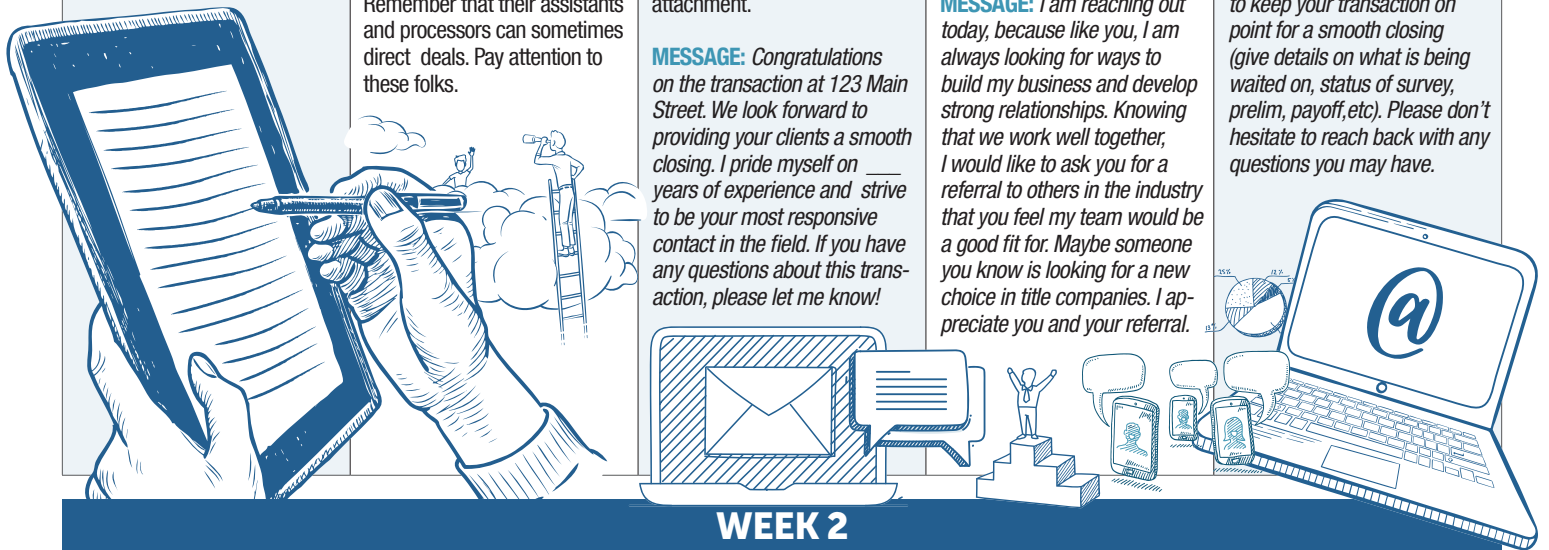
THURSDAY

Referral request ASK YOUR CURRENT CLIENTS FOR A REFERRAL to someone they know who would be a good fit for you and your team. Make it personal.

FRIDAY

Weekly update COMPOSE AN EMAIL to agents with current transactions providing a brief status update.

MESSAGE: *We want to let you know that we are working to keep your transaction on point for a smooth closing (give details on what is being waited on, status of survey, prelim, payoff, etc). Please don't hesitate to reach back with any questions you may have.*



WEEK 2

MONDAY

"Monday Message" This text is sent to prospects. Use some type of graphic or clip art to catch their eye before the text message.

MESSAGE: *Good Morning! How can we help you with your title and/or escrow needs? We are at your service and always ready to "Talk Title". We look forward to hearing from you soon! Thanks so much!!*

TUESDAY

Check-in time Today spend time CHECKING IN with clients on your current open orders. CALL agents who have a transaction in progress and ask about service levels. Are we communicative, responsive, what can we do differently? Ask for honest feedback and identify any potential issues while providing a solution. Take notes during your conversation.

WEDNESDAY

Ask for the order Send a HANDWRITTEN NOTE or an EMAIL to check in and ask for the order.

MESSAGE: *It was great to work with you and your clients on the purchase of their home last month. The home buying process really is the reward in this business, isn't it! We would love to schedule an appointment to discuss what else we can offer. I look forward to hearing from you.*

THURSDAY

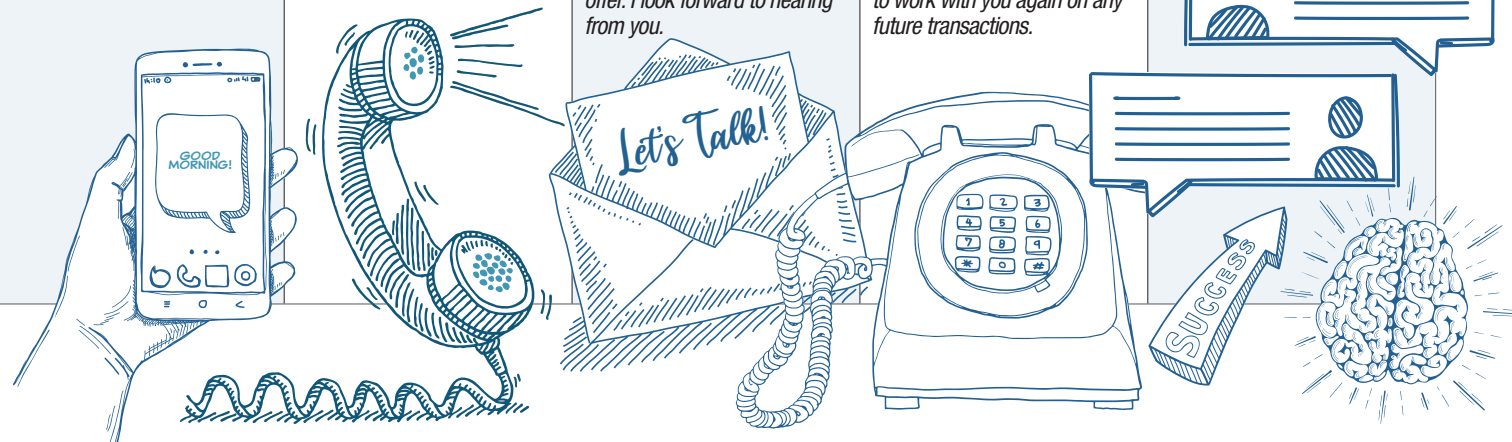
Make 5 phone calls to clients on orders from last month. Tell them that working with them was a pleasure and you welcome the opportunity to work with them again.

MESSAGE: *I just wanted to let you know it was a pleasure to work with you on 123 Main street last month. Knowing you have choices in title companies, we welcome the opportunity to work with you again on any future transactions.*

FRIDAY

Send a text to your top 10 clients letting them know you appreciate them.

MESSAGE: *You are a big part of our success and we just want to say thank you! We are anxious to see you (and work with you again) soon!*



WEEK 3

MONDAY

Thank You for Your Loyalty

These HANDWRITTEN NOTE CARDS can be used for loyal clients and those clients who you want to be loyal... agents giving you some of their business.

MESSAGE: *We just want to let you know how much we appreciate your continued loyalty. It is wonderful to have professional relationships and to support each other! Thank you for entrusting us with your transactions - it means the world to our team. We look forward to working together with you soon.*

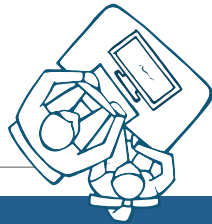


TUESDAY

Experience Interview

CALL 5 AGENTS as a team. Use speaker phone and introduce each other to the agent. Let them know you are calling in to double back on the closing.

MESSAGE: *We are calling to check in and see how you are doing and how we did on your last transaction closed with us. We really appreciate your feedback. Overall, would you say your experience was great, good or maybe you've even become a client for life? Is there anything we could have done better or differently? How would you rate our responsiveness and communication? If you had the opportunity to direct your next transaction to us, would you? We appreciate your feedback. Thanks for your time.*



WEDNESDAY

Get Social!

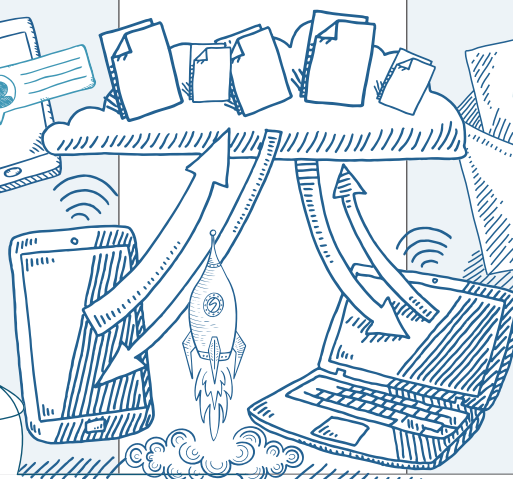
Boost your firm's social media presence and connect with important audiences in no time at all. Get started with ConnectOR by The Fund. Search by category, topic or target. Share directly to your social media accounts now or later. Engage realtors, lenders, buyers and sellers with content they care about.



THURSDAY

Download Marketing Materials from The Fund Shop.

COMPILE INDUSTRY INFORMATION of value to share with 10 of your prospects. INCLUDE A PERSONAL NOTE with the flyer. Be a resource. Let them know you thought they might find this info beneficial.



FRIDAY

Appreciation Day

(Transaction Coordinators and Processors): Let them know you care. Send a Handwritten NOTE CARD. These folks often handle the majority of paperwork and are often overlooked. Recognizing their hard work will go a long way.



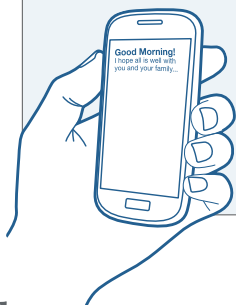
WEEK 4

MONDAY

Outside the Box Clients/Prospects

REMINDE your family, friends, neighbors, your basic sphere, what you do for a living.

MESSAGE: *I hope all is well with you and your family. I am reaching out today to ask a favor. You may be aware, but as a reminder, I am in the title insurance industry. My role is to assist buyers and sellers obtain title insurance. I take pride in the fact that a good portion of my business is by referral. I've enclosed a few business cards which can be passed along to anyone you may know who could benefit from working with us. Thanks so much!*

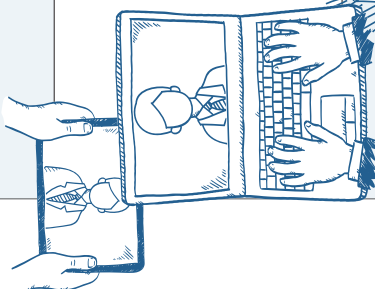


TUESDAY

Video Appointments

The goal today is to identify 3 clients who you have not received business from in a while. Part of the goal is to set video appointments with these agents and let them know you would like to be a part of their continued success and would like to understand why they may have made other choices for their title needs. Make these phone calls or send an email.

MESSAGE: *You have been a valuable client and we miss you. We welcome the opportunity to serve you again and hope that you are doing well. We'd like to set a time to visit with you over video and check in.*



WEDNESDAY

Welcome New Customers

Write HANDWRITTEN NOTE-CARDS to contacts who have directed their first order to you.

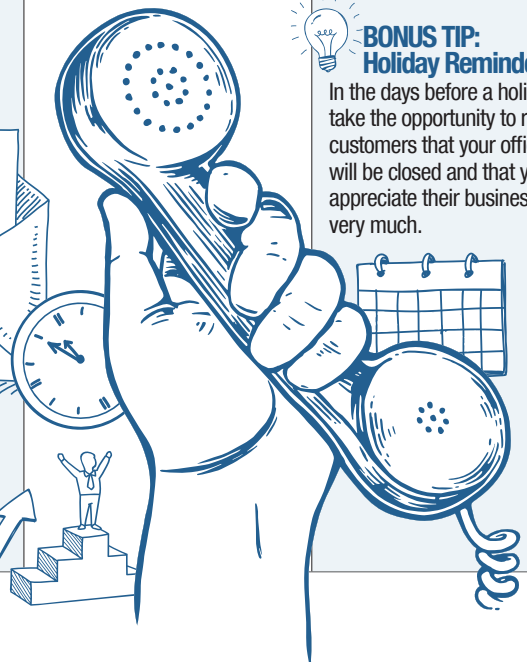
MESSAGE: *We are honored to have the opportunity to work with you and your clients. We look forward to a long and prosperous future together.*



THURSDAY

Good News Calls

DELIVER SOME GOOD NEWS BY CALLING not emailing. It's easy. People are missing the personal touch these days. Taking a few moments to make a personal call can go a long way.



"Peace of Mind Calls"

Take the worry away from the agent and MAKE THE PEACE OF MIND CALL even when there is nothing new to report. Let them know it's all good.

BONUS TIP: Holiday Reminder

In the days before a holiday, take the opportunity to remind customers that your office will be closed and that you appreciate their business very much.

