



Boost your Business

Build and Connect with your Database

by Natalie Danielson

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1. You will be provided with a booklet of with the class material. It is only for use as clockhours under Professional Direction. Any other use by permission only.
2. The course has been divided up into one hour sessions. In Washington State a “clock hour” is 50 minutes. There are questions about each session. They can be answered while reading the material, at the end of the session, or at the end.
3. **Answer** the questions on the quiz answer sheet.
4. If you have any questions regarding the material or the questions, don’t hesitate to email Natalie Danielson.
5. **EMail** Answer Sheet and Evaluation to Professional Direction clockhours@gmail.com
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Disclaimer.. the course materials and questions are not to be used for legal advice. Information can change over time. Real estate transactions are handled different ways in different regions in the State of Washington. If you have any comments or concerns about the material contact Professional Direction.

Thanks!

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Session Hours	Major topics Topics	Presentation
Session 1 1 hour All your Future Business is within Your Reach	<ol style="list-style-type: none"> 1. We know we must keep in touch 2. Are you still in the real estate business? 3. You have fans that are all potential leads 4. We have a tendency to repeat what we know. 5. You work with professionals referred by friends 6. There is NO shortage of Real Estate Brokers 7. Where do Prospects and Clients come from? 8. Reluctance to sell to friends and family 9. Avoid “selling” when Building your Network 10. You are needed by your sphere for your knowledge 	Lecture Discussion
Session 2 1 hour Create a simple database	<ol style="list-style-type: none"> 1. Start building your database 2. Choose a simple program 3. Get bulk email account 4. Back it up 5. Own your data 6. Who do I consider in my database 7. How do I get contact information 8. How many people do I need to have for an effective database 9. Don't take unsubscribe too personally 10. Your future business is in that database 	Lecture Discussion
3 1 hour Have a strategy to connect regularly	<ol style="list-style-type: none"> 1. Your sphere needs you 2. Connect with your sphere on a personal level 3. Create a target list from your database 4. Send a monthly email 5. Pick up the phone 6. Facebook 7. Send notes 8. Shake hands as much as possible 9. Follow up 10. Predict your future 	Lecture Discussion

Boost Your Business

Build and Connect with your Future Business

People make decisions every day as a consumer for goods and services. Many decisions are rather mindless because they are, in many cases, routine. Most decisions people make don't affect their future in any critical way. We get bread and milk at the grocery store, we order books online, we get gas for our car at the station in town.

There are some purchase decisions, like the purchase of a property, that affect the buyer's financial status and future. The decisions are based on calculations, analytic evaluation, and emotions. When working with a real estate agent to negotiate the way through a transaction, people often choose that broker based on a referral from a friend, relative, connection, or a personal relationship because it is important to have a sense of trust when making large financial decisions.

Yet, real estate brokers in search of more business often choose to find more prospects by buying leads. These leads can cost an arm and a leg! The goal is to get exposure so as to be visible in hopes a stranger will choose you as their broker to help on the largest financial investment in their life. It is much more difficult to turn a complete stranger into a client, than a person that already believes and trust in you. But, the tease of getting all kinds of prospects seems to work on brokers for decades because it appears so much easier to buy a lead than to connect with their own personal leads. If buying leads is all it takes to get a client in real estate, then everyone would do it. But, you won't find a broker who depends solely on purchased leads.

Top real estate brokers will tell you that much of their business comes from referrals. Yet, the majority of real estate brokers do not have a good working basic database! It is time to BOOST your business using the possible prospects all around you! There are potential clients looking for you! Improve your exposure and connection. Build your database. Find new connections and build relationships.

This course focuses on the importance of a database and how YOU can make it Boost Your Business.

Course Objectives

As a result of taking this class the agent shall be able to:

1. Know your future business is within your reach
2. Create a simple Database
3. Develop a strategy to connect

All your Future Business is within Your Reach



All your future real estate clients are already connected to you. Most brokers don't realize this concept and they are constantly looking for new and fresh prospects. But your future business is right in front of you! There are millions of programs that real estate brokers can buy that promise business leads. There are dozens of lead generating resources from Zillow to neighborhood websites that promise qualified leads for a fee to build your business. You will never find a real estate broker that could attribute his or her success strictly to buying leads. People work with professionals that they trust. Most often their clients come from their personal contacts or referrals.

1. We know we must keep in touch!

Every person in sales knows that a past client is the best potential as a future client. All your future business is within your reach. This includes past clients, friends, family, and an active approach to building a clientele. Though we all would like to have a magic list of prospects, we forget how close that list really is to you.

Few... very few... real estate brokers have a decent, up-to-date, workable, readily accessible database of their sphere including family, friends, past clients, prospects and ... well... just everyone they know! It is crazy.

We all know that it is important to keep in touch with past clientele and our sphere, but most agents do not. They see to be so ready to hand a credit card to some yahoo who is selling yet another magic potion that will bring them leads. Brokers that are paying for leads say they bring them business. Brokers who have stopped paying will tell the truth about the lack of leads for the money. Consumers do not want to be a "lead" that a salesperson paid for!

2. Are you Still in the real estate business?

The one dreaded question that every real estate broker has heard during their career is: "Are you still in the real estate business?" Yikes, there is nothing worse than to hear that question.

You're in a coffee shop and one of your friends comes across the room thrilled to run into you because it has been a couple years. You sold her the first house she ever owned 5 years ago. She has a little girl in a stroller. During the chit chat all you can think about is that you can't believe how long it has been and that she and her husband now have a few children with the oldest in

preschool. They are going to need a new house because you remember that the house was quite small. Her husband is now in management and she works part time. "Why did I not keep in touch?" you ask. She says, "I had no idea you were still in the business!"

We have all been there. If it is a lucky day, that past client says that they need your help to buy a house. If the cards are different, they might say that they didn't know you were still in the business and they just bought a new house.

This is when you get the contact information and promise to send this old friend some information that might help them regardless of whether they are working with an agent or not. Keep them on any database... because you just don't know. Maybe, they are not satisfied with their real estate agent and want to follow up in the future. They may even send you a referral.

If you kept in touch with your sphere, you'd probably never hear that question!

- _____ If you kept in touch with your past clients, would you hear that question as often? "Are you still in the business?"
- _____ Do you think you would be more successful if you kept in touch with your sphere?
- _____ Would you have an easier time converting prospects if you worked with past clients and friends?

3. You have fans that are all potential leads!

You have a crowd of fans that just love and respect you. They make a difference in your life. That crowd, called your "sphere of influence," is where the majority of your real estate business will originate almost from the first day you hang that license in a firm.

All your fans are potential leads for your business. They are leads that are considered "warm" leads because they are already familiar with you and your will draw them to you. They know what to expect just like they do when they walk into a hamburger franchise.

I enjoy the friendship I have with the loan officer I have worked with. We have become friends over the years. He and I have had lunch, been to parties, and chat on Facebook. When another friend is looking for a lender, I refer this loan officer because I know and trust him. This is a "warm" lead. I would feel bad if my friend was pressured to use another lender that is not as qualified or respected. I want my friend to have a good experience getting a mortgage loan. When the loan officer chats with my friend, he has already been referred by me... so his meeting is much easier than if he was meeting someone off a cold call.

4. We have a tendency to repeat what we are most familiar with

McDonalds does not have the best hamburgers. When we order that hamburger and fries, we know exactly what to expect. It is familiar. There are no surprises. And we return, even though next door the burgers might be better, cheaper, bigger, healthier, etc. I have a tendency to date the same typ of guys...just like my dad... ugh!

You might remember the transaction with a past client didn't go as smoothly as you would have liked. This might create some anxiety when choosing to put them on a list and keep in touch. Your perception of a transaction is completely different from the clients. In addition to all the problems that arise, they trusted you to get them the house they wanted. They also had their own challenges behind the scenes. They will come back to work with you if you kept in touch.

We all have a tendency to be drawn to something or someone who is familiar. Sometimes that last boyfriend seems so much like the one before. When hungry, I am often defaulting to some well known hamburger franchise even though the food is not good or healthy but I trust that it will taste like the last time I was there. I remember the experience and, like many of us, will repeat it again because it is safe and familiar.

- _____ Have you found yourself repeating something familiar over and over?
- _____ Are you sometimes surprised that a past client referred you after their buying experience?
- _____ Wouldn't it be better to assume past clients will hire you again the next time they need real estate help?

5. You work with professionals referred to you by friends?

The most successful real estate brokers get most of their business from referrals from friends, family, past clients and just people that they know. A good personal referral system is operating effectively when it is the source of 80% of your business. When you have an organized plan to put into action a referral based business, it can take from 2 to 3 years before it feeds you. Ask homeowners how they chose their real estate broker and most will tell you that there was some kind of personal connection.

Most people rely on personal referrals when selecting a doctor, lawyer, insurance agent or financial consultant. In these fields, as in real estate, "trust" is a key factor when choosing a professional to represent your best interests. Our world has become so full of technology and we are getting out of touch with customer service. How do you know who to trust?

Let's consider online dating. Everyone has the ability to create a profile with professional headshots and an intriguing bio. How do you trust that babyface? Or, on the other hand, the person might have bypassed the idea of a good profile and looks pretty questionable. But, an introduction by your best friend to the same person changes the way you start to consider that person. There is a better sense of trust because of that connection.

We can often forget how often we use referrals for services. In one week, I looked at the referrals to people I work with that are in the service business.

On Monday, I went to my doctor who was referred to me by a friend. On Tuesday, I went to a class that a real estate agent suggested. Wednesday, I went to the bank that was referred to me by the loan officer that refinanced my house. Thursday, I paid my insurance premium to the agent that was referred to me by the last insurance agent that left the business. My car was repaired on Friday by a repair shop that my daughter's friend recommended. I had my hair cut on Saturday by a relative.

Think about the people that you currently work with in sales or the service business. Were you referred to them by a friend?

Doctor	Hair cut	Banker	Contractor	Accountant
Insurance agent	Masseuse	Lawn/ tree service	Caterer	Dentist
Baby sitter	Car repair	Chiropractor	Attorney	Pet sitter

6. Why do people refer others?

Most of your future business will come from the people you know in your world. People refer other professionals to their friends and family because they care about you and want the best for you. They may also care about the professional they are referring.

Did your doctor ask you to send your friends to her? Did your attorney beg you for leads? Did the accountant brag about his/her success hoping it would encourage you to send leads? No, they did not. That is not how leads are generated. All of them build their business primarily on referrals but they seldom beg you for leads. People can sense desperation, and no one does that better than a real estate agent begging for leads. People will send you business if there is a mutual trust and basic connection to them.

I give out leads to real estate brokers consistently. I consider what the prospect is looking for and match that prospect with a real estate broker that I feel best meets their needs. I never consider sending a lead, which could be one of my best friends, because a real estate broker says to me, "Don't forget my name when you have a lead." Brokers constantly give me their real estate cards after class and say they will take care of my leads. But, did that broker invite me to coffee? Do I have any connection with that broker in my personal life? Has that broker ever sent me leads for my business?

Consider how you are relating to the people in your world and whether you are interested in their business and their life. Would you send them a lead?

Look at this from the other direction. Are you the "best" real estate agent in the market to help them? Do you believe that you are? Would you send your best friend, past client, or sister to that real estate agent sitting next to you at the office? If your contact was looking for commercial property and that is not your expertise, then a referral to an agent that better sets their needs is the best strategy. But if they are looking for a home in the area you work, would you really want to put your friend, past client or sister in the hands of a rookie, for example?

- _____ Do people want to be a lead for a salesperson pursuing them?
- _____ Do you jump at the chance to register on a website so you can be a lead and get sales calls?
- _____ Do you sometimes give out a fake email or phone so you won't be bother

7. There is NO shortage of Real Estate Brokers

This may be news to you, but there is NO shortage of real estate brokers in our market. They are everywhere.

From a prospect's perspective, there is no way to look at a broker's business card, his/her resume, a for sale sign, or a website and determine if that stranger is the one to help make the largest financial decision of a buyer or seller's life.

On YouTube there is a humorous video out of Great Britain that shows a woman in her home detailing her frustration to an inspector. She is so worried about her house being "infested" with real estate brokers." They are everywhere... in the cabinets, behind closet doors, etc. This video is so funny because there is an exaggeration of the truth. But in reality, there is no shortage of real estate brokers!

Consumers are secretly playing hide and seek. Seldom will they register on a website or leave a phone number where it can be captured. They need to trust that their agent is in touch with the market and at some point, they will announce the "big reveal" to the lucky real estate broker.

How many real estate brokers are you competing with?

In Washington State during the year 2016 there were 36,224 active Licensees in 3929 firms. Of the licensees, approximately 23% hold a Managing Broker's license.

The Northwest MLS is the largest MLS in the state with about 28,000 Brokers which is about 80% of the brokers licensed in the state. The number of monthly sales has hovered around 10,000 in the state.

Of the 80% of the brokers in the state that hold an active license and pay the MLS fees and dues, the number of sales per month is modest. Less than 1/3 of the brokers have a sale on the average in a month. That statistic has stayed near the same for years. There are many brokers that have many more sales during a month. Some brokers lump all the sales for a team under one broker's name. There are brokers that are not very active in sales because they are rookies or they may be nearing retirement. But, if you take out the high and the low statistics, the majority of brokers have 3 or less sales per month.

In 2017, we will see a record number of new licensees take the exam and become rookie brokers actively looking for business.

8. Where do Prospects and Clients come from?

It sounds just so easy to find potential buyers and sellers especially to rookies in the industry. They worry about how to write a contract or how to order a sign. They are rarely told that is the easiest part of the job. Finding a prospect that wants to work with you is by far the most difficult aspect of a real estate broker's career!

I often ask brokers, "Would you sell more properties if you kept in touch with our sphere including your family and friends?" They always reply, "yes!"

I'll also ask, "Would you have an easier time converting prospects if you worked with people you know or were referred to?" They again reply, "yes!"

Then I ask, "Why don't I take the time to put my future business in a list and keep in touch?" They respond with a shrug, "I don't know. Seems easier to be "given" a potential lead." There's a feeling that a credit card produces a hanging carrot to go after instead of looking in the produce bin we already have.

I often ask real estate brokers in classes about 3 of their most current clients. "Where did you meet them?" "Why did they choose you to list their house?" Almost exclusively, the clients were from the broker's sphere or referrals. A few were working with a past client. Rarely will a real estate broker answer that they have business from expensive lead generation prospects. Though, might brag about the prospects they had from spending money on a lead generation program for a specific zip code, they rarely will say that their last clients were from those cold leads.

Consider who might want to be a "lead." Are there prospective buyers and sellers out there in the market wondering how to find a real estate broker? Is anyone out there searching for a broker?

The goal of a real estate broker is to build a referral based business by creating a following so that the leads are "warm." Otherwise, the brokers will just keep chasing random "cold" leads.

According to the *2014 National Association of Realtors® Member Profile*:

Experienced real estate brokers in the business 16 or more years get 42% of their business from repeat clients and an additional 21% of their business from referrals. That is a total of 63% of experienced brokers attribute their business to their past clients and referrals.

This referral business is what every real estate broker is trying to achieve. That number could be higher, but there are so many brokers who simply do not keep in touch with people that they know including their past clients.

Building a base of business from referrals and past clients takes time. Time can seem to be an obstacle. Newer real estate brokers must develop relationships with a number of prospects as they build their sphere. As time goes on, the number of referrals can grow based on how well brokers keep in touch with them consistently and on some kind of personal level.

The *Annual Trends Report for 2016 by Properties Online* compiles information for several sources to give an overview of statistics that affect the real estate buyers and sellers.

The survey notes that 72% of real estate buyers would “definitely” use their broker again or refer their broker and 16% would “probably” do the same. But, only 10% of buyers “actually” used a broker they had used previously.

The statistics are different for home sellers. About 42% of the sellers were referred to the broker that they worked. But, 24% had used their broker previously. Could this be because listing brokers have been in touch more consistently with past sellers? Still, about a quarter of the consumers listed with their previous broker!

In the survey, sellers were asked if they would use the real estate broker again and 67% said “definitely” and 17% responded “probably.” That means that over 84% of sellers would use their broker again, but only 24% of sellers actually used the same broker for the next sale! Less than 18% of brokers touch base with past clients on a monthly basis according to the report.

The major reason they didn't use their previous broker was most likely because the broker did not keep in touch.

Approximately 80% of the brokers in Washington state have only a handful of transactions a year. Let's say that you were a broker fortunate enough to have 8 real estate sales in a year. That would mean you would have to follow up with only 8 past clients in the next year. Yet, only a fraction of the brokers even do that!

Statistics should make it clear to you how important it is to maintain relationships with past clients and to keep in touch with your sphere. Your past clients and your sphere are the source of most of all your future business. These people are already fans and believe in you. It is much easier to work with them than walking up to a stranger on the street corner and suggest that person trust you with their money.

- NAR statistics show that less than 10% of buyers use their broker again. Do you think the reason is that the broker didn't keep in touch?
- Do you think buyers do not use their past broker because they are just looking for houses online?
- If 84% of sellers would use their broker again, but only 24% did, then doesn't it make sense to keep in touch?
- A rough guess is that about 80% of the brokers in Washington have 8 or less transactions a year. It would seem that brokers have time to follow up with their past clients? Do you agree?

9. I don't want to 'sell' to my friends and family.

It is important to recognize the fear you might have to telling friends and family that you are a real estate broker. Make a list of the reasons you might hesitate. The reasons can be as varied as “They might think I am not good at my job” to “They might think that real estate is not an honorable career after working in the military.” “They might ask how many sales I have had.” You might worry that the relationship could be ruined if there is a problem with a transaction.

I had a friend in real estate who did not want to work with anyone in her family or any of her close friends. I would ask, “Really, don’t you think that you would serve them best instead of a stranger? Don’t you think they like you enough to refer you?” She basically didn’t want to ever disappoint and “fail” in front of people that she knew. She was embarrassed to let them know she sold real estate. She thought it was easier to work with strangers and cold leads because there wasn’t any emotion involved. But, she also tended to trust strangers and got herself caught up in several scams because she believed their stories. She lasted only a couple years and quit.

When there is a relative who might be considering you as their broker, avoid selling yourself, and instead believe in yourself as the best broker for them. The attitude you project is often stronger than the words that you say. They already believe in you and they are considering whether they are making the “right” decision

Relatives and friends might also have unreasonable expectations. They might expect you to work for little or no compensation. They have no idea that your knowledge and ability have value. They might expect open houses every day or an ad on the television.

Your friends, family, past clients and prospects “NEED” you! They need to have someone that believes and trusts them! They need a real estate broker that will look out for their best interests! You are not selling to them! You are there to help your sphere and share the knowledge you have in the area of real estate for their own best interest... You care about your friends, family and prospects!

- _____ Do you wrestle with listing the house of a relative because they might have unreasonable expectations?
- _____ Do you feel that you are the best broker for your relatives?
- _____ If a best friend wants to purchase a property, are you or a broker they just met best for their representation?

10. Avoid “selling” when building your network

This is a fear many real estate brokers have that gets in the way of their own self-promotion. It does sound easy to “keep in touch” with people you already know. There is that fine line between keeping in touch and appearing like a used car salesman bugging others.

The only way to build your business.... is to actually “build” it. You must actively prospect and develop relationships. You aren’t building business by throwing business cards into the crowds at a Mariner Game. You aren’t building business by sending out bulk mail or buying advertising. Building the business means that you are getting to know people. You can envision all the people you know in a sphere. It is important that you continually make that sphere larger.



You should build your sphere with all your contacts. Keep it active and growing. Remember, that you are not “selling” yourself to your sphere. They already believe in you, and you have identified them as fans.

We have all been with a family member or a friend that took every opportunity to try to convince us to be their client. As they drone on about their success or some product, we wish we could turn around and start singing “Somewhere over the Rainbow” just to change the energy. It could be a fast way to clear the room.

Let your love of your work shine by telling people about the waterfront house you just previewed or how the value of real estate has doubled in the past several years. You might have been locked out on the balcony of the second floor master suite or walked into the wrong house surprising the homeowners who were making out on the couch. Your stories and the enthusiasm you project for your career is your best sales pitch!

Consumers have a tendency to think that real estate brokers make more money than is true in reality. An engineer on the latest space flight might talk about the challenges or the excitement, but not about his/her income or bonus. Consumers often think that real estate brokers make more money than they actually do. Sometimes riding the tails of success can be uncomfortable for prospective customers.

Your sphere including your friends, family, past clients and prospects “NEED” you! They need to have someone that believes and trust them! They need a real estate broker that will look out for their best interests! You are not selling to them! You are there to help your sphere and share the knowledge you have in the area of real estate for their own best interest... You care about your friends, family, and prospects!

The average consumer really has no idea how a real estate transaction occurs and closes. It is a mystery how the MLS and cooperating brokers work, how to work within the boundaries of the laws and forms. There can be over 100 people involved to make that transaction close. When you connect with your sphere, it is important to make sure it is genuine. You need to be as interested in them as they are in you.

I was at a party with my dentist. He doesn't ask everyone if they are looking for a change in dentist? The dentist doesn't look in everyone's mouth evaluating the amount of work that may need to be done. Of course not! The dentist chats with everyone about their lives. Most of the time everyone knows that the guy with toothbrushes on his tie is a dentist. But, he is not there to sell himself. He asks as many people what they do for work as they ask him.

_____ Is it better to get business cards or to give them to prospects?

_____ Do you think the consumer often sees the real estate industry as a bit mysterious?

_____ Have consumers been led to believe that real estate brokers make more income than what is reality?

Section 2

Create a Simple Database

1. Starting or Building a Database.

The idea of starting or working with a database seems very overwhelming. It almost is too big to contemplate. It is easy to avoid because it doesn't seem like it will pay off in the short run. Getting the car washed or checking the latest political posts online, though, won't generate prospects, and ends up as a good diversion. I can hear you thinking, "Let's see, I should check CNN.com right now!"

You can focus energy to identify your future business contacts. When I look at my computer screen, I can see that everyone listed is a connection to future sales and I know they support my career. Your goal as an agent is to work only with referrals. Top agents don't prospect... Instead, they connect with their sphere knowing the next sale will be connected to them.

2. What program do I use?

Far and away the majority of real estate brokers have absolutely no database. The closest list of their sphere would consist of the contacts on their smart phone, the friends on Facebook, a partial list in Outlook, the gmail contact list, the list of closed sales from their office, or the annual Christmas card list. The groans can be heard across town when brokers are encouraged to open up that computer and start a list.

When I start asking real estate brokers about their database, they seldom answer enthusiastically. One broker literally started crying. Another broker defiantly stated that he didn't need to have a list of his friends and family. Another broker said it would take too long. Most brokers avoid the question. Its like asking a teenager if he has done his homework. It's the same type of response.

There are well over 100 different database and contact management software systems on the market. Some are designed for real estate agents and some are not industry specific. They all share two things in common: they are all complicated and expensive. Even the least expensive is approximately \$100 a month. That does not seem like a high dollar figure, but it is over \$1000 a year. You would wince if you were going to spend money this year to replace your phone or computer that you used almost hourly, so why spend money on a program that is rarely ever used. Do not buy a program that has all kinds of bells and whistles because you will not use them. We don't use a fraction of the features on our laptop or our phone.

Use the most basic spreadsheet that you have access to. Most people have Google docs, Outlook, or Excel on their computer. All of these give you the opportunity to mark your contacts as family, friends, or members of the local Chamber of Commerce, for example. You can easily transfer the information to an email, an email program, or often to labels for mailing. Start and stay in a simple program. The harder it is for you to work with, the less you will use and grow it. It should be accessible from your mobile phone and computer.

DO NOT Upload your database into someone else's program whether it is free or not, owned by your company or a "hot" software product you were recommended.

You keep your credit cards in you own wallet. You don't let someone else keep them for you! You want control over where those dollars are spent. You don't want those credit card numbers on your office database! Ergo, you don't want anyone else in control or with access to your fans!

There are many Client Relationship Manager (CRM) types of programs, that are designed for salespeople and some for real estate brokers specifically. Consider seriously if that is worth the investment. Few people ever keep up with a CRM. Just say, "no!" If you are not working with your database now, it is not worth it to make it complicated. Start easy... Just a spreadsheet. A CRM sounds good, but with our busy lives, it is hard enough to keep our contacts on our phone or spreadsheet updated! Drip campaigns are basically spam and can irritate your friends and family.

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3. You will need an account to send out Bulk Emails

Email has not changed substantially since we opened our first account using dial-up on AOL. We use it every day to communicate. There are days that I don't listen to voice mail or even answer the phone. But, I make sure I check if there are any important emails.

Though we all get spam. But, you don't want to be identified as a spammer. There are bots out there that will recognize that you are sending out bulk emails. They don't know if you are sending an email newsletter to your large list of friends or whether you are emailing about the fastest way to make \$1 million dollars online with the latest scam. So, email bots may block your bulk emails.

That is why you need to sign up for an email program that assures the "Board of Directors" of the internet that you are not sending out spam. Some email programs are available through your office, for example. Some email programs are also CRM's that will offer one free month. Really? A free month? Some email programs promise all kinds of templates that will catch the attention of your prospects. Some will guarantee success beyond any reasonable response rate. Some will give simple templates full of "valuable" information for your prospects. Don't believe any of the promises or offers. The more "professional" or "snazzy" your emails are... the fewer that will be read.

The most common initially free and inexpensive programs to utilize are MailChimp.com and ConstantContact.com. These programs are very inexpensive. You design very simple emails. Do not spend time reinventing the wheel. When working with the next email, use the last one as a guide or template.

Most simple database programs like Excel or Google Docs will be able to be copied easily into an email program.

4. Back it up

Make sure that you have your valuable database backed up at all times. It can seem overwhelming, but it is not. If you lost your cell or computer, today, you should be able to have access to all your information within hours. I hear people moaning because they ran over their cell phone or smashed their computer. Yes, that is so stressful. But, in this world, you should have had all the information at your fingertips from the cloud. There are programs such as Dropbox.com, Box.com, and iCloud that will back up documents automatically and are accessible from anywhere. Paper is a thing of the past.

For extra protection, purchase an external hard drive and copy your clouded documents.

5. Make sure you “Own” your Database

Get that database on your own computer and then BACK IT UP! Your database is really your only asset in the real estate business! If you were to “sell” your business... it would be worth only as much as another perceives the leads are worth. “Own” your database. It is important for your future!

If you build your database in a proprietary system owned by your real estate firm, for example, in most cases you have just given away your contacts list.

A real estate agent moved from one firm to another. She ordered business cards, worked on her website, and uploaded her database into the new firm’s CRM program. She was promised that drip campaign the company developed would bring her more business from her sphere. At one point she decided to move across town to another brokerage, and her current firm would not release her sphere database. So, while she was promoting herself at a new firm, her past contacts and clients were getting “junk mail” from her old firm eliminating her name, of course!

If you decide to use proprietary software at your firm, keep your database current and accessible on your own computer so that you “own” those names. Put your names into a basic Excel spreadsheet and keep that current. Update your own database first! Then, if you do decide to use an email marketing program, you can upload your database... but the original copy you still own.

6. Who do I Consider My Sphere for my Database?

You should include everyone that you know and everyone that knows you. Your fans believe and respect you. They all need to be in touch with you. Your database or sphere is something that you build constantly. Putting all those people into a contact list could increase your business by 10-20%.

The real estate industry involves trust between customer and client far more than a person handing a hamburger out a drive through window or a bank teller cashing a check. We tend to trust the people that we are closest to more than strangers.

A real estate transaction is the largest financial transaction that most people will ever experience. That, in itself, triggers our emotions. Then you add on the fact that it may be the place called “home” for one year to decades and may also include family. Trust is one of the most important characteristics that consumers evaluate when deciding on a real estate agent.

You need to include all your family, friends, acquaintances, past co-workers, members of clubs, schools, churches, alumni, neighbors, etc. Don’t upload lists from church, kids team parents or clubs without permission.

There are times that you might have to consider whether it is appropriate whether to include certain people on your database. Do not hesitate to include any of your “fans.” There are people that know you and love you. Even the “dorkiest” people probably have close to as many fans you your might have. There are times that you should think twice before adding people to your database. For example, you might not want to add everyone that you spouse works with at the office unless they consider you a “friend.”

One of my real estate broker friends and I were at a meeting along with someone in management at the firm. She had just given a housewarming party for her clients that had closed on their first home. She reported that the party was a fabulous success. She was given the invitation list by the homeowners, and sent out invitations. After the party, she sent out thank you notes by email that included her contact information at the real estate company. Her manager insisted that she add those names to her database and put those people on a drip campaign of spam emails. She argued that she did not have permission to do that from the new buyers. He insisted that they were new prospects and explained that it was important to add them. Again, she refused. It was uncomfortable listening to the manager pressure her because I agreed with her. The list of the friends of her clients was not given to her for marketing... but only for the party so I would hesitate to add them to a database without permission from the homeowners. The homeowners might gladly say to add them, but, on the other hand, they might be offended. Ask.

- An effective database can help build your business.
- It is important to back up your database separately from your computer or office program.
- You need an email program to send out bulk emails effectively.

7. How do I get the contact information for each of my contacts?

Start with what you have easily on hand when entering information. If you go chasing after a person’s email or street address, you can get lost in the world of the internet and have a hard time getting back to the project of inputting names. Focus on putting together a list. Do not focus on all the contact information!

If you don't have all their contact information.... ASK! People will tell you! If you have the phone number of your friends, you can just call or text them. Don't just say you want to add them to your list. Ask for their address so you can send them something... Then, think of something personal to send. I might text a friend asking for their street address and then send out a card with their photo, a book I loved or some flower seeds.

If you want their email address, then send a text or a facebook message and ask for their email so you can send them a personal note or a link to something they might be interested in.

I love connecting with artists. I saw one on an artist group that lives in a city I grew up in. I asked if I could come to her studio when in town. I have never messaged or chatted with her before. Since then we have shared work with each other and I just sent her a card for the new year.

Most importantly, get their names into a spreadsheet and work out the details later.

but he sends text messages all the time. He will drive by and see a house in their neighborhood for sale and he will text to tell them and he doesn't have to ask if they are going to sell because they tell him. He doesn't have a spreadsheet or contact list, but he has everyone in his phone.

8. How many people do I need to have for an effective database?

Most people have about 200 people in their world. If you consider the invite list to a wedding, funeral, notable birthday party, or other major life event, the average person has about 200 people that are directly connected to them and would be concerned or notified.

Robin Dunbar did a study decades ago on primates to see how many other primates they associate with. This information was taken and compared to humans. The humans "Dunbar Number" is around 180-220. On the average, you have about 200 people in your world. Then a study was done before email was popular that concluded that, on the average, the British participants sent out 153 Christmas cards. The average Facebook user has over 300 friends but the mean number is 200.

Shoot for a database with 200 names of people that you know. Right now you can rattle off the names of 25 people. OK... start there.

Most real estate brokers "plan" to start a database. It seems like a large undertaking that will just add to the overwhelming number of things that are pulling for time. But, it is one of the most important ways to spend time. It must be done in little chunks. If you are new, that list should be climbing over 200 within a year. If you have been in the business for several years, it is often just a matter of collecting the names. That can feel like trying to collect marbles that have fallen on the floor.

There are ideas on how to start. First, open up your computer to a spreadsheet program.

List everyone you can by first and last name.

Go to your phone contacts and just start with the first letter of the alphabet.

Use your holiday card list, if you have one, as a starting point.
Open up an older database and start from there.

This can be done by yourself. Or, you can hand off your phone or computer to someone to just start this for you. It could be your teenager. If you make this into some huge project, it will never get done!

I have offered to help about a half dozen real estate friends on this very project to create a database. I suggest just sending me 5-10 names and I will make a spread sheet. We can fill in the information later. They all can use the help. Yet, not a single one has participated though they really want to have good database. We all have our own challenges, and blocks.

If you have no database spreadsheet to start with, then shoot for 25 names. Then start working with that list. No one on your list knows how many others you are sending emails out to. Always put them in BCC... which is for blind copies so that the addressee is not listed. But, get an account with mail chimp or Constant Contact.

9. Don't take "Unsubscribe" Personally

Honestly, I do look at the unsubscribe list and wonder why they deleted me! I have to shake my head and tell myself to keep moving forward. I click to unsubscribe quite often. I think that I just can't be bothered. We are bombarded in our lives with spam of all sort. The best way to avoid unsubscribers is to make any communications rather personal and not spammy.

It does remind me that a database is fluid and always changing. I need to add 5 times more names than I have of those that left my list.

10 Your Future Business is in that Database

You are surrounded by people that are supportive of your business. Don't doubt that. This is the time to identify your sphere. Most successful agents are working exclusively with referrals. They don't go prospect in the community. Instead, they know that the phone will ring from a past client and someone that referred them individually.

Section 3



Develop a strategy to connect regularly

1. Your sphere NEEDS you!

Will all your friends and family just remember you when they need a real estate broker? Is there a chance that they might wonder if you are still in the business?

On the average, 20% of the people in your sphere are potential clients at any given time! You may have a database with 100 names but your sphere is larger. There are at least 200 people around you in your world. Of those 200 people, 20% or 40 people have questions about real estate to ask you!

They are considering a move, wonder how much their house is worth, wonder if they can afford to buy, wonder if their daughter can qualify for a mortgage, wonder if it is time to buy a vacation property, wonder if it is a good idea to buy investment property. They don't know the interest rates, what is required to get a loan, and if the market is what the new purports it to be. It is important to connect with your sphere so you can be there to answer questions and be available as their "broker!"

Would you rather your friends and family choose a broker that is not as capable as you? Of course not! So, get your name in front of them regularly!

Junk mail is not enough to connect with your sphere. You can buy programs that will put your contacts on a drip campaign. There are videos and training seminars that say this is the best thing since apple pie. But, it is essentially junk mail.

Whenever you shop at retail stores no matter how big or small, you are asked to give them your email so you can be the first to find out about special offers. Sometimes, you basically "have" to sign up to get the best prices on the products at the store. Sometimes, it is just for promotions. Then the stores send you emails... and more emails... The emails might have coupons or sales that require a purchase within days. How do you feel about the emails you get from the stores that had you sign up for their preferred shopper card? It can just plain be annoying. In most cases I just "unsubscribe" because I can tell it's just junk and I am not missing anything. The emails are no different than the junk coupons you get in the mailbox. Is this what you want to subject your prospects to in their emails? Is a drip campaign going to bring you more business?

Once a past client or friend unsubscribes, you have lost them. So, the more you make whatever you are emailing compelling to read, the greater chance that they will remain on your list.

Yes, it is important to make use of email because you can NOT get any cheaper than email! But the more personal the email campaign is, the more chance it would will receive a response or they might just read it. It must be genuine!

When I get emails during the two times a year that we have to adjust our clock an hour, I just delete them. But, if I get an email from someone with a subject line that read something like.. “When I forgot to turn the clock back this happened...” Then the email could have a personal short humorous story. That would get more response than a junk spammy email.

Send out regular emails but make sure that you are connecting with some personal information. Consistency is important. Have a plan. Make any plan easy! Make it your own! Do not buy products ... don't spend money unless you have extra dollar bills hanging around.... Do you?

2. Connect with your sphere on a personal level

Purchasing real estate template with decorating ideas or recipes is mindless dribble. It is just junk mail. It may look pretty with a rainbow of colors and fabulous photos. It might promise a happier life in a newly designed kitchen. But, consider how much time you spend reading the junk mail in your mailbox in front of the house or mixed in your emails from stores you had to register an email in order to get a discount. Do you get excited reading spammy emails that bombard you constantly? The best emails that are opened, read and remembered are those that have some personal information!

Know that the reader will spend less than a minute to read an email you send out. There is between 10-20% chance that a recipient will actually click and read the email. They will seldom scroll down through a long one.

People are wary of clicking on links. If you find an article that you think is interesting, summaries it in three sentences and add your take in another two sentences.

When I get spammy emails reminding me to change my clocks for daylight saving time, I just delete them. I rarely open them. But, if the email was a personal story that means it is not spam. For example, “Last year when I forgot to change my clock, this happened... “

We do rely on our cell phones, Alexa, the television, and our computers... and in WA state, when the Feds approve it, we will have eliminated daylight saving time changes.

- A personal message to your sphere can be more powerful.
- About 20% of your sphere are potential clients at any given moment.
- People are wary of clicking on links. Write your own short note and include a quote from an article.

3. Create a target list from your database!

Target a specific number of your clients on a regular basis using mail! Send notes to people. It may seem “old fashioned” but we open those personal note cards first when we see them in the mail.

This target list is not the people that you think will need your services right away. It should include people that you know very well. They are your top fans. They tell their friends about you. They admire you. Put them at the top. They are people that you enjoy talking with and you know them by first name. They know others that know you. They call you by your first name. They remember something about you or the family... like your daughter loves baseball.

Put something in the mail regularly (Or let Amazon do it) to a group of your sphere. It does not have to have high value, but it means so much. You can be more effective targeting your biggest fans with something special vs spending the money throwing business cards out at a Seahawks game.

Also, look at what your friends are posting on Facebook. Are they having a baby? Go buy a onesie and stuff in a priority mail box. Do they like to garden? Send seeds you pick up at the grocery store. Do they like to fish... a lure might be fun to send.

- A gift of a blanket (gloves, flashlight, etc) from Amazon (NOT BRANDED) from your insurance agent might encourage you to him/her a call.
- Most people open personal notes from the post office first.
- It is more effective to communicate WITH not AT your fans.

4. Monthly Email to your Sphere

Send out an email once a month. It must be short and, most importantly, personal! If you send out one canned email, your sphere will be able to tell that it is canned... and you may be unsubscribed the first time you send an email. Then, that person is gone from your list.

For example, on Valentine's day, write an email about something you did in the past. For example, when you were a kid did you make little valentines? What is a gift you gave or received? Then, you might say something about the market... “Has your valentine asked about looking at new homes? This month is the time as the weather gets better!”

Short Sweet.... Personal... Make sure you add something about you in each email. Don't “Sell!”

Don't make is spammy. You can buy all kinds of programs that will do this automatically... But... What if you spent an hour and created an email that was interesting... it could be about how you celebrated the holiday, some interesting feature in a house you just sold, or about a non profit that you are supporting,

Think of a signature item or idea you can do that can make you memorable. A funny Christmas card yearly, Seahawks schedules along with something blue and green, 12 of something during football season, flower seeds, etc. The holiday pie event is an idea.

5. Pick up the phone

Think about whether you would be happy if your insurance agent called you at 7pm to chat. Hmmm... is that what you want?

If you are going to call your prospects and clients... read their Facebook posts first! If they are on Facebook, they will tell you what is happening in their lives. Try to have at least one reason to connect. You could have a column on your database that will trigger one thing that you remember about that person. If you have nothing personal to discuss, then take a peek at the activity in the market in their neighborhood. Find out about the listings or sales. Some statistics say that about 25% of the buyers move within less than 5 miles of their house so that they stay in the same school district or have the same commute time.

My friends just moved to the next suburb in the same school district. They had worked with an agent years ago on their last sale. At Thanksgiving, the broker had a pie give-away. This has become a popular holiday gift with brokers purchasing carts full of pies from the local bakery or Costco, for example. Every year, their agent called to inform them of the Holiday pie event and asked if they wanted pumpkin or apple pie. By doing this, she had a connection, a reason to call, and an opportunity to catch up with them and their family!

Maybe you can invite them to a shredding event at your office, a charity collection, or an open house in their neighborhood.

Make the call short and sweet. Make sure you tell them:

- That you have been thinking of them because you remember a time when...
- That you are checking in to see how they are doing
- That you are planning ...
- Ask if they are interested in finding out what their house is worth in this crazy market. Have they looked at Zillow and wonder if it is accurate?
- Tell them you are really enjoying selling real estate and to remember you if they know someone in the market.

Avoid scripts! Write your own. The scripts that top trainers encourage real estate brokers to use are plain, dry, and do not make a connection with the person on the other end of the line. You need to want to talk to the other person and be interested in their life.

6. Facebook

There is nothing more powerful than Facebook for real estate agents. There are you clients and prospects right there... You can see what they are up to, their family, their hobbies. Take time every single day to post something... alternate between personal and a real estate post. Then take time to “like” at least 5 posts of people and comment on 3 posts each day. That will generate conversation.

You can do the same thing on LinkedIn but the interaction isn’t always so direct.

7. Send Notes!

Thank you notes. It seems that a thank you note is “old fashioned.” We all appreciate something in the mail that is not a bill or junk! Rarely do we ever send a note out to people. One way to make this easier is to have thank you notes WITH postage on them ready to go!

I sent a referral to a real estate agent and he sent a thank you card and a coffee gift card. It was small, but it meant so much.

Anniversary (home purchase) or birthday cards are appreciated. You could do them once a month.

Notes do not have to be just thank-you cards or holidays. You can just send random cards.

Take a photo from Facebook and make it into a card.

Every week I try to send out 2-3 cards from an app called Ink. I take a photo off their Facebook or one that I have taken and send them a card. If the photo is just great, I don’t put my name on the card. It is in an envelope and my return address is on the back. I sometimes just randomly one of my friends or clients.

When was the last time you send something to a past client to reward them for their business and their loyalty.

Examples can include:

Thank you note.

Coupon for a free latte.

An invitation to an annual party.

A discount coupon to a local store.

8. Shake hands as much as Possible



When you call customer service because you have a problem with a well know brand name product, it can be frustrating to know the person on the other end of the telephone line is across the ocean, doesn't really seem to care, and has no ability to make any decisions. You could receive a ton of emails about the company's charitable giving or the fun contests they sponsored that you can enter. But, the idea that the closest you will get to a real person is the phone or computer. No matter how nice they are, you will not have a real relationship.

People have tried to do so using online long distance dating. It is a rare situation if that worked. Belly to belly, eye to eye, or the handshake is the best way to build a relationship.

Consumers want a real person that they can trust. It is imperative to take the contact that you have made online and make a personal connection. This means you will have to meet them in person.

When I discussed with a real estate broker about meeting up with prospects and even current clients, I was met with the big "UGH!" She had a new listing and just wanted to take the listing and not have to meet with the crazy lady who owned it. She just didn't want to talk to people or go meet them for coffee.

The more you can meet face to face, or "Belly to Belly" as the author Tom Hopkins used to always say, the more chance you will have a potential client.

It can seem easy to just mail out cards, emails and coupons, but the more difficult part of your position is to create relationships with people and that is much easier done by meeting them!

9. Follow up!



Real estate brokers always have their smart phones within reach. They check them constantly. Email and text messages are constantly bleeping for attention. But, for some reason, it is difficult to get a real estate broker to answer the phone or return a phone call.

Yes, today, we live in such a “busy” world. We are often overcome with stress or face an overwhelming day. So much of our work is not actually bringing in income. We wander through the maze of clients, prospects, office information, spam, unmotivated clients, demanding clients, along with the additional stress from our family and friends. Life is complicated and difficult.

What we are most after in the real estate industry is a “real” client. It is hard to distinguish the ready to buy client from the one that is just going to waste time. It can make us feel a bit crazy.

How do you handle the barrage of phone calls and emails?

One way real estate brokers handle the large number of calls is to make sure that the callers are listed in their contacts list so the caller ID will show their name. When listing a person in the contacts list... put some tag under the company name and a code for the month and year. That way you can tell when the phone rings most of the time where that call may stand in a priority list.

Some real estate brokers make use of an assistant to follow up on all clients and calls. This can be an expensive alternative but if you are past that tipping point, it may be something to consider.

How many prospects can you work with at the same time?

It can be difficult to juggle too many prospective buyers and sellers. It can be hard to remember their names, their motivation and their situation. Some real estate brokers have a list of all prospects either on paper or on a notes page on their phone with short notes so they remember what they need to know about the prospects.

I couldn't work with indecisive buyers for a long time. I would work with them to look at properties and narrow down their search parameters. At a certain point, because of my personality and juggling family, I had to refer the buyer to another agent that had the patience and time to work with them. I knew my limits and lack of patience. I worked more often with listings because this part of the business was more predictable. Choose your business!

10. Predict your future!



You create your future. It is like a journey. You have some kind of destination in mind. You plan for it. You pack what you need. You have resources. You have a road map of sorts. But, along the way there are changes that you make to your plan. You might just pass by one of your destinations because you are tired or bored. Your car may have a flat tire screwing up your timing. The car breaks down so that your budget is seriously affected. You can't remember your actual destination.

The same thing happens in your real estate career. You can make all kinds of plans, but something gets in the way. Most problems or challenges can be solved. The ones that are the worst are those that you have the most control.

We get Lazy. We have... excuses. We get Discouraged. We don't see the destination ... Clearly. We might even Give up.

If you look in the rear-view mirror, you will see where you have been and how you got there. If you repeat the same drive the results are typically repeated. On your trip... you typically keep moving forward.

When I was driving in France in a rental car with my daughter, we entered a town with a large castle. Our destination was the next town with a bigger castle. All we had to do is drive through town and cross the bridge over the river. "Mom, that is our third time passing by that lady." We were circling around that castle over and over because I couldn't get to the road to the bridge. I had to try something different to get back on track or I would keep going around and getting the same results.

Now is the time to change what you are doing. To create your journey and on the way you might have several destinations. Yes, there will be challenges, but don't let your own challenges be your biggest obstacle,

With the prospects you currently have and the ones that you are going after, you will grow your business in the direction you want. Go create your future business the way you want!



Boost Your Business

Complete answers on this form. Mail or scan with evaluation to Professional Direction. It is important to make sure the agent participated in the course material for clockhours.

1. What is the main reason that you do not have a good working database? _____
2. Do you remember the last time someone said, "I didn't know you were still in real estate?" _____
3. Do you think that you be more successful if you kept in touch with your sphere? _____
4. How many fans do you have around you that you would call your "sphere of influence? _____

Make a list of 3 professionals that you work with who were referred to you by a friend or family member.

5. _____
6. _____
7. _____

Name two professionals that you have referred to friends or family.

8. _____
9. _____

10. Do you predict a shortage of real estate agents in the near future? _____
11. How many licensees in Washington State as of the 2016 statistics? _____
12. Do you believe that there are prospects or leads that are struggling to find a real estate agent? _____
13. Do you believe in your heart that you are the best real estate agent for your friends and family? _____
14. What percentage of your business last year was as a result of referrals or past clients? _____
15. Do you have some anxiety working with or marketing to friends and family? _____

- 16. What advice would you give other real estate agents who might have concerns about marketing to family? _____
- 17. Have you ever gone to a professional like an insurance agent recommended to you by family? _____
- 18. Name a few CRM's or database system that you might have you might have heard of. _____
- 19. What would you say some real estate brokers pay for a CRM or database software program monthly? _____
- 20. Have you subscribed to a CRM or database software program? _____ Are you successfully using it? _____

What are the three main reasons your database is not current, accurate or workable?

- 21. _____
- 22. _____
- 23. _____
- 24. If your database is currently in a proprietary program, do you know how to download it to your computer? _____
- 25. Why would your email provider potentially block an email that you send out to 500 people? _____
- 26. What would be one way to get the contact information for a past client? _____
- 27. Do you include everyone you consider your "sphere" in your database? _____
- 28. Robin Dunbar did a study of the number of primates others socialize with. Taking that information he concluded that the average person has about _____ to _____ in their social sphere.
- 29. The number of people in our social sphere is sometimes referred to as the _____ number.
- 30. How many people are in your database? _____
- 31. How do you plan to increase that number in the next year? _____
- 32. What would you like to change about your database? _____
- 33. How do you keep track of your database? _____

34. Where do most of your prospects come from? Name three areas. A club, social media, family? Etc?

35. Keeping in touch with your sphere is the most _____ activity you can do for your real estate business.

36. A daylight savings time reminder email is much more powerful if it is _____

37. Do you get spam emails from real estate agents, finance people, insurance agents and like to read them? _____

Name three retail stores, online publications or professionals that email you monthly.

38. _____

39. _____

40. _____

A good plan to connect with your sphere for the next three months would include the following:

41. _____

42. _____

43. _____

44. _____

45. _____

46. What is one way to get a person's email if you only have the home address? _____

47. What is the most difficult thing about keeping in touch with prospects? _____

48. A real relationship with someone includes _____

49. Each week you could take two online relationships and either _____ or _____

50. If you want to know what the future will look like, look at the _____

Name _____ Signature _____ Date Completed _____

You must attach to the Evaluation along with tuition to get clockhours.

Professional Direction clockhours.com

clockhours@gmail.com

Thanks, Natalie Danielson



Mandatory Evaluation

Did you read the material in the booklet on this date? YES / NO
 Did you complete the quiz and attach answer sheet? YES / NO
 Did you pay Tuition YES / NO
 Did you fill out and sign this form? YES / NO
 Why did you choose to take this course? Topic? Time? Cost? Ease? Other?
 A "clock hour" is 50 minutes. This 3 hour class should take about 2 hrs 30 min. How long did it take to complete the course? _____

Will the material you learned improve your performance?	
Were the course materials easy to follow?	
Were the course materials relevant to your profession?	
Were your objectives met by attending the class?	

What are 3 things that you learned from the course?
 1. _____ 2. _____ 3. _____

Boost Your Business

Print Name CLEARLY	Signature	Company
Address	City Zip Code	Phone
	Email	
License Renewal Date		Date class taken

Thanks for taking this class! I really appreciate the agents that take clockhours from my school! I am always working on my classes and writing new ones!

**Professional Direction, email: clockhours@gmail.com
www.clockhours.com**