# Spring Forward: Jim Walberg on the ‘client touch’ strategy

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*Don’t forget that we’ll also be focusing on how agents and brokerages can all move Faster, Better, Together this July at Inman Connect San Francisco. Not got your ticket yet? Buy it here, and remember that Select members get a $100 discount. Thinking of bringing your team? There are special onsite perks and discounts when you buy those tickets together too. Just contact us to find out more.*

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We recently had the opportunity to chat with Jim Walberg from Pacific Union International’s The Bay Area Team in San Francisco about the tactics, advice and insights that have allowed him and his team to successfully grow their business over many years.

## What are the three most effective things you do every day to grow your business?

The first thing I do each morning for my business is:

1. Put together my daily action plan: marketing; social media; escrow work; and our “Client Touch” plan actions.

In a data driven world, how well do you know your recruits?

You can’t build a relationship with generic marketing materials READ MORE

2. Call five of our “Top 100.” (They each get a monthly phone call from us, just checking in as to what is going on in their lives.)

3. Write three handwritten notes.

## What strategies do you use for securing referrals?

We have a “Client Touch Strategy” that is implemented daily, weekly, monthly, quarterly and annually. Our “audience” is “touched” at least 40 times a year through postcards, phone calls, handwritten notes, quick visits, special client events (dinners, cocktail parties, quarterly seminars), our Thanksgiving pie event, dropping off poinsettias to our top 100 during the holidays; inviting our “audience” to participate in our community service projects and more.

The layer after layer of our “touches” creates top of mind awareness and nonstop referrals.

## What strategies do you implement to secure listings presentations?

My answer will begin by stating that almost 100 percent of our listing appointments are because of client or sphere of influence referrals. So why we receive referrals is because of the implementation of our “Client Touch” program.

Once we secure the listing appointment, the following action items are implemented:

1. The best listing presentations offer: data regarding the local market and comparable sales; insights into how you plan to market a seller’s home; social proof that proves you are a top-notch Realtor who gets results for homesellers; a personalized “pitch deck” — Moxie Presents is the one we use.

2. Focus on your seller’s situation and needs first. Ask questions. Dig deep. Listen 90 percent of the time you are doing this critical detective work.

3. Analyze all of the seller's information you can gather before you meet with him or her.

4. Detail comparable home sales from the last six months, or longer if additional data is required.

5. Include quotes from satisfied clients in your deck.

6. Paint a picture by telling stories regarding your marketing approach.

7. Figure out how you will best relay your value proposition to this specific seller. Your approach may be different for a computer engineer than it would be for an educator.

8. Prepare for lots of questions and some objections. Since we have been in hundreds of listing presentations, we can probably determine what the common ones are and have answers ready.

9. Dress as if you have already secured the listing and sold the home.

10. Don't be a "yes" agent just to get the listing. Be truthful about what needs to be done to prepare the home and the likely price range if the home is properly presented.

## How do you handle working with sellers on pricing?

We approach our seller's pricing strategies as if we are an appraiser. We review the past six months to a year of comparable property sales. We focus on the condition and location of the home. We select the top three similar homes that are currently on the market. We then provide a price range we believe is appropriate and let the seller select a price within our suggested range.

In addition, if the home is not in turnkey condition we will bring our stager to provide a "punch list" of what she believes is required to bring it up to market-ready condition.

If the seller is not willing to do the recommended work, it will impact the recommended price range. In our market region, if a home is not in turnkey condition, it will take much longer for it to sell.

## What's the best piece of advice you ever heard?

To whom much is given, much is required.

## If an agent should stop doing one thing today, what would it be?

An agent should immediately stop having social media be a time suck. My guess is, if an agent did a time tracking assessment of how much time they spend checking Instagram and Facebook each day, they would be shocked at how much it is diverting them from having the opportunity to work on

and in their business.

Social media is preventing them from doing the “relationship business” work — being on the phone, or face to face, with their “audience” of clients and sphere of influence.

*Want to connect with Jim? You can find him on Facebook, Twitter and LinkedIn.*

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