

## Networking Tips that Work Lender & Real Estate Agent Networking

### Tips for Success

As a lender, you never know where you'll find your next client. Sure, you represent friends, family and colleagues, but how do you position yourself and showcase your business when you want to grow your professional network?

The following scenarios will arise from time to time, and unless you've done this a dozen or more times before, knowing what to say and how to position yourself can be tough. Consider these helpful tips for the nuts and bolts of your communication efforts.

#### Client HAS a real estate agent:

- Be proactive and ask your client who their agent is
- Confirm that your client is comfortable having you contact their agent
- Do they have a Zillow profile? You can see their reviews
- Find their contact information
- Call them and follow-up with an email



#### Client does NOT have a real estate agent:

- Review details and confirm with contact that they are not working with an agent
- Offer to introduce them to someone

#### Follow-up:

Follow-up within three days and make sure that the appointment has been set. When following up with the agent, confirm that the agent has:

- 1 Set up a listing alert
- 2 Has all the correct search parameters set based on pre-approval
- 3 Is following up frequently to check in on the client

## Be yourself

The primary, fundamental thing you must do always—and without exception—is be yourself.

It's that simple and that basic. Don't be someone you are not. People are smart, they get it, and they can spot a phony just a few words into the conversation. You'll gain more respect and make better connections by being yourself than by adopting some persona that you think people will like better.

Being yourself is important and one of the few absolutes in business. While it's only the first step, it's the foundation of all that follows.



## Be helpful

Be helpful. People want to do business with two fundamental types of people—people they like and people who help them.

Act as an asset to every buyer. If they don't have a real estate agent yet, demonstrate value to them by connecting them with a real estate agent who can introduce them to neighborhood details, schools, restaurants, shopping etc. If they already have a real estate agent, you can demonstrate value by being punctual and responsive throughout the entire loan process. If they have a good enough experience, they may even refer a friend to you in the future.

You can also demonstrate your value to real estate agents several ways. Something as simple as giving them good contact information for the borrower and noting the best times and best ways to contact them can be really helpful and let both parties know that you're taking their personal interests into consideration. Additionally, having the buyer pre-approved before you contact the real estate agent can show them that you take their time seriously.



## Be pleasant, not pushy

The hard sell is out of style. Don't be pushy. Nobody wants to be pushed into working with a lender or real estate agent - especially when arguably dealing with the biggest purchase of their life. Dare to be different. You'll stand out in a positive way by being non-sales-like, a good listener and a skilled conversationalist.

