**Transitions Notes Logo, company name

Description automatically generated**

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Transition: The transfer of relationships.

Webster: Something that links one state, subject, place to another **:**a connecting part or piece.

We need to script the below to match our personalities. Our clients need to KNOW this!

**TRUST – Our clients are sizing us up, looking at the below traits:**

**Character Traits Competency Differentiating Factors (from the heart)f**

Integrity **Systems \*\*** Network

Passion **Structure \*\*** Track Record

Persistence Experience Flexibility

Resilience Knowledge Customization

Hard-working Reputation Value Partnership

Motivated **Genuine Caring \*\*\***

Nurturing Blah, blah, blah! **Patience \*\*\***

Fun Boring Conversations! **Listening \*\*\***

**Dependable \***

Personable These are our WHY for joining Stepping Up!

Relational

Problem Solver

Dedicated

Empathetic

Professional

**\* Dependable is the most important of all traits to our client**

**\*\* These two are often lacking, we have them in Stepping Up!**

**\*\*\* These are Differentiating Factors, includes caring for Referring Agents!**

**Why our Referring Agents are doing this, they’re getting on with:**

Travel

Freedom of time \*\*\*\*

Financial freedom \*\*\*\*

Family, grandkids

Volunteer work

Team

Consistency of support

Continuity of their business

\*\*\*\* Time & Freedom – these are the same to reasons most Realtors get into business years ago.

Stepping Up! brings Realtors’ lives full circle, we give it back to them! There is life after real estate!

One Referring Agent remodeled her home office into a gym right after joining! Freedom!

X ------------------------------------ **Transition = A Process** ----------------------------------------------X

Proof Results

**NOTES:**

Team Leads, Working Agents, and Referring Agents each must lose their egos, to each other and to clients. Referring Agents need to show clients confidence in their teams, that they trust them totally. Then the client will assume that trust. Clients will use your attitude to vet and validate your team.

They initially took a leap of faith to trust you, encourage them to do so again to trust your team! They know you’ve taken care of them and would never abandon them, let them know you’re still the same you!

They know you & like you 🡪 leads to trust you 🡪 leads to doing business and referrals with you 🡪

and now with your Stepping Up! Team.

Let them know nothing has changed as far as character and competency is concerned. I now have a “bank” of people I trust, just like me! You’ve aligned yourself with a team with similar values.

A survey of the Referral Agents present showed that each wants to do 0% of the work, they do not want to be involved. However, they want to retain 100% of the relationships. Focus on the relationship and have your team take care of the work (showing, follow up, contracts, etc.).

What part of this RE business do you want to keep involved in, and how can we help you do that? (relationships). And what part do you want to get rid of as fast as you can, and how can we help you do that? (transactions).

Team Leads and Referring Agents need to have the conversation up front that the team will handle the business, you handle the relationships if you want. Referring Agents handling the transactional business will confuse the client – who do I go to? Referring Agents handling the relationship will increase future sales and referrals!

Yet letting go of your business takes practice in trusting your team. Confirm their core character and competency and then just let go. And enjoy the life that your Stepping Up! Team wants to give you!