



## Sphere of Influence (SOI) Database-Building Exercise

### **Objective:**

To identify and categorize everyone in your sphere of influence, engage with them meaningfully, and build a database that can be leveraged for real estate and home concierge services.

### **1. Create Your SOI List:**

Brainstorm and write down everyone you know. Use these categories as prompts:

- - Family: Immediate and extended family.
- - Friends: Close friends, acquaintances, and childhood friends.
- - Neighbors: Current and past neighbors.
- - Work Contacts: Former colleagues, current co-workers, vendors, and clients.
- - School/Alumni: Classmates, teachers, or professors.
- - Community Contacts: Members of clubs, gyms, sports teams, religious groups, or volunteer organizations.
- - Service Providers: Doctors, hairstylists, baristas, mechanics, or others.
- - Social Media Connections: Facebook friends, Instagram followers, LinkedIn connections.

### **2. Categorize Your SOI:**

Group each contact into one of these categories:

- - A+: Close relationships highly likely to send referrals.
- - A: Relationships that may refer you with a little prompting.
- - B: Relationships that know you but may not send referrals yet.
- - C: People who may not know you're in real estate.

### **3. Gather Contact Information:**

Ensure you have:

- - Full name

- - Phone number
- - Email address
- - Mailing address
- - Social media handles

#### **4. Segment for Targeted Communication:**

Organize your SOI into groups to tailor communication:

- - Potential Buyers
- - Potential Sellers
- - Vendors or Collaborators
- - Homeowners
- - Renters

#### **5. Reach Out and Reconnect:**

Example script:

Hi [Name], I hope you're doing well! I wanted to let you know about some exciting updates with my real estate career. I've joined Holland Group Real Estate, where we offer a full-service Home Advisory model to help homeowners at every stage. I'd love to catch up and hear what's new with you! Let me know if you ever have questions about real estate or home services—I'm here to help!

#### **6. Log Contacts into CRM:**

Enter every contact into Follow Up Boss with tags for segmentation (e.g., 'Friends,' 'Potential Buyer') and set follow-up tasks.

#### **7. Commit to Regular Engagement:**

Engagement Plan:

- - Weekly: Call 5-10 people.
- - Monthly: Send a market update or personal check-in email to everyone.
- - Quarterly: Mail something tangible like a postcard or handwritten note.
- - Yearly: Host a client appreciation event and invite everyone in your SOI.

#### **8. Set a Growth Goal:**

Set a specific goal (e.g., adding 5-10 new contacts weekly). Review and update your list monthly.

#### **9. Track Results and Celebrate Wins:**

Review progress during team meetings, share success stories, and reward agents who meet their database growth goals.