

'SIP ON PEACE OF MIND' PLAN

Pop-by Gift: A small jar of gourmet hot cocoa mix in a festive mug with a tag saying, "Warm up your holiday season—let me handle the paperwork while you sip in peace!"

This gift could be a mug (festive or branded) filled with:

- Hot cocoa powder, marshmallows, candy canes or gingerbread cookies
- Include a festive or branded mug with your logo and the slogan, "Making your season (and your transactions) stress-free."
- Include a handwritten card with the message, "Just like a cup of hot cocoa, I'm here to keep your transactions warm and smooth this holiday season! While you enjoy the festivities, leave the paperwork to me—I'll make sure everything flows as sweetly as your favorite holiday drink!"

Message/Script for the Initial Interaction dropping by their office

- **Delivery Method:** In-Person
- **Message:** "Hi **[Agent's Name]**! It's **[Your Name]** from **[Your TC Business Name]**. Just wanted to stop by with a little holiday cheer! December can get so busy with all the celebrations and end-of-year transactions, so I wanted to make sure you know that I'm here to keep everything running smoothly so you can really enjoy your holiday season. If you'd like to chat about how I can make your next transaction even easier, I'd love to connect. Enjoy the treats and happy holidays!"

Immediate Follow-Up Message

- **Delivery Method:** Text Message or Email (within 24-48 hours of the initial contact)
 - **Message:** "Hi **[Agent's Name]**, it's **[Your Name]** from **[Your TC Business Name]**. I'm just following up after dropping off your holiday treat! I hope you enjoyed it and that the season is treating you well so far. With everything getting busier, I'd love to chat about how I can help lighten your load and make your transactions stress-free. Let's grab a coffee or (maybe some more hot cocoa) soon—let me know when you're available!"
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Touch 1: One Week Later

- **Delivery Method:** Email
- **Message/Script:**

Subject Line: Let's Keep Your Closings on Track this Holiday Season! 🎄

"Hi **[Agent's Name]**,

I hope you're having a fantastic December! I know this time of year can be extra busy, and sometimes it feels like there's too much on your plate—especially with all the transactions rolling in. That's why I'm here to help keep your closings on track so you can focus on what matters most this season!

Here are three ways I can make sure your transactions are handled seamlessly:

- **Deadline Management:** I'll keep a sharp eye on all the important dates so nothing slips through the cracks.
- **Document Organization:** From contracts to closing, I'll handle all the details and ensure everything is in order and compliant.
- **Clear Communication:** I'll be the go-to person for clients, lenders, and everyone involved, so you can focus on your business while I handle the rest.

If you'd like to discuss how I can help you, let's set up a time to chat! I look forward to hearing from you."

Touch 2: Two Weeks Later

- **Delivery Method:** Phone Call (Voicemail if no answer)
 - **Message/Script:** "Hi **[Agent's Name]**, it's **[Your Name]** from **[Your TC Business Name]**. I hope your December is going great! I just wanted to follow up and see if you've had any more thoughts about how I can support you as your transaction coordinator. With the holidays coming up fast, I'm here to make sure your paperwork doesn't pile up! Let's chat soon!"
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Touch 3: Three Weeks Later

- **Delivery Method:** Text Message
- **Message/Script:** "Hey **[Agent's Name]**, it's **[Your Name]**. The holidays are here, and I know how busy things can get! Don't let your transactions snowball—let me take care of the paperwork so you can focus on closing deals. Let's grab coffee soon and chat about how I can help make your end-of-year closings stress-free!"