

‘WE VALUE YOUR REFERRALS A CHOCO-LOT!’ SUCCESS PLAN

Pop-by Gift: A branded box of chocolates with a tag saying, "We value your referrals a choco-lot!"

This gift could include:

- A small assortment of gourmet chocolates or chocolate truffles
- A Valentine's-themed sweet treat like chocolate cocoa mix or chocolate bars
- A heart-shaped stress ball or mini notepad for a fun branded touch

Include a small, branded note with the message: "Just dropping by with something sweet to say how much your trust and referrals mean to us. Let us take care of the transaction details so you can focus on the clients who mean a choco-lot to your business this Valentine's season."

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]**. I just wanted to stop by with a little Valentine's treat to say that we value your referrals a *choco-lot*! I appreciate getting to support you and your clients, and I hope your February is filled with sweet moments and smooth closings. If there's anything I can take off your plate this season, I'm here to help keep your transactions effortless so you can focus on the things that matter most. Wishing you a successful, love-filled month, and I'd love to chat soon about how we can keep your business running even sweeter!"
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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]**. Hope you enjoyed your Valentine's chocolate treat! Just wanted to follow up and say again, we value your referrals a *choco-lot*! If you're ready to fall even more in love with stress-free transactions this month, I'm here to handle the details. Let's schedule a time to connect and chat through how we can support your February deals. Let me know what works for you!"
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Touch 1: One Week Later

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

Subject Line: Sending a Little Sweetness Your Way...💎💖

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

With Valentine's Day just around the corner, I wanted to send a little extra appreciation your way. Your trust and referrals truly mean a *choco-lot* to our team! We're here to take the stress out of your transactions this season so you can focus on nurturing relationships, growing your business, and enjoying all the sweetness February brings.

Here's how we can help:

Deadline Devotion: Every timeline tracked, monitored, and communicated, no last-minute surprises.

Paperwork Perfection: Clean, organized files from start to finish so everything stays compliant and stress-free.

Communication Cupid: We coordinate with all parties to make sure everyone stays connected and informed.

If you're ready to make this season even sweeter, let's schedule a quick chat. Wishing you a February full of love, success, and choco-lot-level appreciation!"

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]**. February has been full of sweet moments! I just wanted to check in and see how your transactions are going and whether you've had a chance to think about how we can support you this season. With everything picking up, we'd love to help keep your closings smooth and stress-free. Let's connect soon and chat about how we can make your workflow even sweeter!"

Touch 3: Three Weeks Later

- **Delivery Method:** Text Message
- **Message/Script:** "Hey **[Agent's Name]**, it's **[Your Name]**. Just checking in to see how your February is going! If the paperwork or deadlines are starting to feel like anything *but* sweet, I'm here to take that stress off your plate. Let's grab a coffee soon and chat about how we can help you close out this season with ease, and a choco-lot less pressure! Looking forward to hearing from you!"