

THE ULTIMATE REAL ESTATE PLAYBOOK: THE REFERRAL PIPELINE

Personal Touch for Powering Profits

Database Marketing & Checklists to 4X Your Business

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AT A GLANCE

Jenny Hensley is a top-selling agent in Raleigh, NC. Her strategic focus is on consistent nurturing of her sphere of influence, which she does through supporting small businesses and making gift baskets of local goods for each of her clients. Her goal at this stage in her career is that when clients hear the name "Jenny Hensley," they should instantly associate it with care and trust.



**Raleigh,
North Carolina**

PRIMARY MARKET



\$860K

AVERAGE PRICE POINT



9

YEARS IN REAL ESTATE

2023 PRODUCTION STATS

22

TRANSACTIONS

\$17,629,200

SALES VOLUME

\$422,440

GCI

TOP LEAD SOURCES

- ✓ Referrals - 50%
- ✓ SOI - 27%
- ✓ Other - 23%

PRODUCTION

49% | 51%
Buyers | Sellers

TEAM STRUCTURE

- ✓ Solo agent
- ✓ 1 staff member

Jenny

ON COACHING



Joining TF coaching has completely transformed my business in just a year and a half. Before our weekly coaching calls, my daily schedule was disorganized, I didn't have the tools necessary to track leads, and I had no idea if my business was profitable. **Coaching provided the much-needed structure to my daily schedule and has completely changed my mindset towards success. I now have a clear vision of what's ahead, and methods to sustain measurable growth.** I rely on my coach for personal and professional guidance, accountability, and ways to navigate industry shifts. To say that I am grateful for this relationship, would be a sore understatement. The value it's brought to my life is truly amazing, and I'm excited for more to come!



BY THE NUMBERS

97%

of business comes from referrals
and past clients (2023)

86%

of her initial buyer clients use her
for the future sale of their home

51x

ROI on Pop By Strategy





THE STORY

Meet Jenny Hensley, a real estate agent in Raleigh, NC, who started this journey by taking a deep dive into the history of her business. What she and her coach discovered was that an astounding **97% of her business has come from her referrals and past clients**. This revelation inspired her to take a new approach to nurturing her Sphere of Influence (SOI). She then formulated **a comprehensive strategy centered around building lasting relationships and offering a personalized experience to every client who signs with her**.

Jenny is a high-achieving agent, and has been the top selling agent at her firm for two consecutive years. She also ranks among the Top 500 Agents in Raleigh according to Real Producers. Additionally, Jenny is a Guild Member of the Luxury Institute for Home Marketing. Since joining coaching in 2002, she has consistently doubled her Gross Commission Income (GCI) and sales volume, with the average price point of her transactions rising from \$610K in 2022, to \$720K in 2023, and \$860K in 2024.

Integral to Jenny's success is her strategic approach to establishing accessibility and trust, which includes meticulous planning to ensure that every move aligns with her business goals, market movements, and client needs. Her strategy also includes a detailed marketing and social media plan that complements her gifting efforts.

One of Jenny's defining services are her client gifts. Each basket, tailored to individual clients, contains high-quality items sourced from local businesses in their new neighborhood. This strategy not only keeps her top of mind when clients are asked for recommendations, but it also engrains her in the local communities in which she works most.

Jenny's systematized approach to client relationships sets a benchmark in the real estate industry. By focusing on personalized care and strategic planning, she has built a thriving business that continually grows through referrals and repeat clients. Her story is a powerful reminder that success in real estate is built on relationships and genuine care.



THE STRATEGY

PRIMARY FOCUS ON RELATIONSHIP BUILDING

An emphasis on nurturing connections through personal networks and close relationships, without relying on purchased leads. Regular face-to-face meetings often include local tokens of appreciation to enhance trust and accessibility.

- All leads are generated through personal connections and SOI.
- No paid leads.
- Regular in-person check-ins that include local gifts.
- Prioritize trust and accessibility in relationships.

DETAILED BUSINESS PLANNING

Thorough planning is a cornerstone of operations, with strategies laid out a year in advance. Thoughtful gestures and tailored interactions are strategically incorporated to align with business objectives.

- Business planned a year in advance.
- Strategic gifting and contact points based on business, audience, and market movements.
- Schedules purchases, videographers, and content creation.

MARKETING AND SOCIAL MEDIA INTEGRATION

The marketing strategy seamlessly integrates with the social media presence. A comprehensive social media strategy documents every step of thoughtful gestures, focusing on compelling visual narratives and actively engaging with the community.

- Corresponding social media plan that captures each step of the gifting process.
- Emphasis on visual storytelling and community engagement.



THE STRATEGY

POP-BY GIFTS - PERSONALIZED AND HIGH-QUALITY GIFTING

Unique and locally sourced gifts ensure that each client is wowed by the level of personalized service they receive from Jenny.

- Gifting items are sourced from local businesses and vendors.
- Each client receives a unique, personalized gift basket.
- Avoid gifting during predictable times like December.

CONSISTENCY AND ACCESSIBILITY

Consistency is key across communication channels, including email, social media platforms, and personal visits. The aim is to create a feeling of being easily accessible to clients, fostering a sense of closeness and importance in relationships.

- Maintaining a consistent presence through email, social media, and in-person visits.
- Creating a feeling of being 'just a short drive away' for clients.
- Consistent presence via various channels.
- Ensures clients feel valued and connected.

Jenny's 3 Action Items FOR SUCCESS

1

Get organized & create a plan! Set time to focus and write it down. You can't make it sustainable if it's all last minute.

2

Learn how to leverage either people or technology to help you implement your plan. Time is MONEY!

3

Learn to TRACK EVERYTHING! Costs, time spent, income, etc.

6 Things Jenny Will Do

MOVING FORWARD

1

Develop new strategic partnerships with local businesses and expand on her personalized pop by's by identifying new suppliers.

2

Continue to implement her corresponding social media plan.

3

Continue to deploy bi-monthly emails to her database.

4

Continue to strategize often and early, developing business plans and projections for at least a year in advance.

5

Deploy a ZMA texts campaign to her past clients.

6

Work with her Tom Ferry coach to help keep her accountable and to help her implement these ideas!

Jenny's TOOLKIT



2024 Pop-By Calendar

An overview of Jenny's Pop-by and gifting calendar for 2024.

Pop-By System Checklist

Jenny's checklist for deploying a Pop-by campaign and her strategy for client selection.







2024 Spring Baskets Pop-By Example

Examples of the social media posts that are generated by Jenny's strategy.

AUGUST

2024

BACK TO SCHOOL POP-BY

MON	TUE	WED	THU	FRI	SAT	SUN
			1	2	3	4
 <p>ORDER / SHOP FOR MATERIALS</p>						
5	6	7	8	9	10	11
CONFIRM RECIPIENT LIST	 <p>FILM SHOPPING FOR ITEMS & PACKAGES BEING DELIVERED</p>			MAP OUT & ASSIGN THE DELIVERY ROUTES FOR JENNY & ZUZ		
12	13	14	15	16	17	18
	 <p>ASSEMBLE & FILM MAKING BASKETS</p>			 <p>DELIVERY DAYS!</p>		
19	20	21	22	23	24	25
 <p>ASK CLIENTS TO SHARE & TAG YOUR POP-BY'S ON SOCIAL MEDIA</p> <p>REPOST THE CLIENT LOVE ON YOUR SOCIALS & REAP THE MARKETING BENEFITS!</p>						
26	27	28	29	30	31	
	 <p>FIRST DAY OF WAKE COUNTY SCHOOLS</p>					

POP-BY GOALS:

1. HIGH QUALITY/NAME BRAND GIFTS.
2. SHOP LOCAL WHEN POSSIBLE!
3. FILM! THE MORE B-ROLL THE BETTER.

NOTES

TRACK EVERYTHING:



- TIME
- MONEY SPENT
- INCOME
- CLIENT REPOSTS
- CLIENT TEXTS

*IF YOUR ASSISTANT DELIVERS THE POP-BY,
BE SURE TO SEND THAT CLIENT A PERSONALIZED TEXT*

PRODUCED BY: JENNY HENSLEY

YEARLY CALENDAR

- ADULTS
- CLIENTS W/ KIDS

JANUARY	FEBRUARY	MARCH
<p>NEW YEAR'S WINE BOTTLES</p> <ul style="list-style-type: none"> • QTY: 30-40 • * REMINDER * <ul style="list-style-type: none"> ◦ CREATE CUSTOM LABELS & RIBBON BY X DATE 	<p>VALENTINE'S CANDY BAGS (LOCAL IF POSSIBLE!)</p>	<p>NO POP BY'S IN MARCH (BREAK BETWEEN WINTER & SPRING POP BY'S)</p>
APRIL	MAY	JUNE
<p>SPRING BASKETS</p>  <ul style="list-style-type: none"> • QTY: 50 • ORDER ITEMS BY X DATE <ul style="list-style-type: none"> ◦ LOCAL IF POSSIBLE • ARE THEY HIGH QUALITY PRODUCTS? <ul style="list-style-type: none"> ◦ THEME: GARDENING? FLOWERS? BRIGHT COLORS? 		<p>NO POP BY'S IN JUNE (LOTS OF CLIENTS ON SUMMER VACATION)</p>
JULY	AUGUST	SEPTEMBER
<p>BACK TO SCHOOL BASKETS</p>  <ul style="list-style-type: none"> • QTY: 30-40 • ORDER ITEMS BY X DATE • DROP OFF BEFORE SCHOOL STARTS • ARE THEY HIGH QUALITY PRODUCTS? <ul style="list-style-type: none"> ◦ NAME BRANDS: SHARPIE, CRAYOLA, BIC, ELMER'S 		<p>NO POP BY'S IN SEPTEMBER (2 BIG FALL POP BY'S PLANNED)</p>
OCTOBER	NOVEMBER	DECEMBER
<p>FALL MUMS FROM LOCAL FARMER</p> <ul style="list-style-type: none"> • QTY: 75 • * REMINDER * NEEDS CUSTOM RIBBON 	<p>THANKSGIVING PIES (LOCAL IF POSSIBLE!)</p> <ul style="list-style-type: none"> • QTY: 50 • * REMINDER * NEEDS CUSTOM TAGS & RIBBON 	<p>NO POP BY'S IN DECEMBER (LOTS OF CLIENTS TRAVELING FOR THE HOLIDAYS)</p>

CLIENT SELECTION STRATEGY

IMPORTANT QUESTIONS TO ASK ABOUT WHO GETS WHAT AND WHEN

DO THEY HAVE KIDS? IF SO, AGE & HOW MANY?

DO THEY HAVE PETS?

WHAT ARE THEIR INTERESTS/HOBBIES?

WHEN WAS YOUR LAST CONTACT? (EMAIL, TEXT, CALL)

WHEN IS THE LAST TIME YOU SAW THEM IN-PERSON?

WHAT WAS THE LAST POP-BY YOU BROUGHT THEM?

DO THEY FIT INTO THE POP-BY THEME?

WHERE DO THEY LIVE, GEOGRAPHICALLY?

HOW RECENTLY DID THEY PURCHASE THEIR HOME?

HAVE THEY GIVEN ME ANY REFERRALS?

HAVE THEY USED ME MORE THAN ONCE?

DO THEY HAVE SOCIAL MEDIA?

HAVE THEY TAGGED YOU AFTER RECEIVING A POP-BY BEFORE?

DO THEY ENTER MY GIVEAWAYS/ENGAGE WITH MY SOCIAL MEDIA?

POP-BY SYSTEM CHECKLIST

TASK	DONE
IDENTIFY THE THEME OF THE POP-BY	<input type="checkbox"/>
IDENTIFY HOW MANY YOU ARE MAKING	<input type="checkbox"/>
IDENTIFY WHO IS GETTING THEM	<input type="checkbox"/>
DETERMINE WHAT THE ITEMS WILL GO IN (BASKET/BAG/BOX)	<input type="checkbox"/>
DETERMINE HOW MANY ITEMS YOU WILL NEED TO FILL THE BASKET	<input type="checkbox"/>
CREATE ANY CUSTOM LABELS, RIBBONS, ETC IF NEEDED	<input type="checkbox"/>
ORDER ITEMS ONLINE (PAY ATTENTION TO DELIVERY DATES)	<input type="checkbox"/>
SHOP FOR ADDITIONAL MATERIALS IN-PERSON	<input type="checkbox"/>
PLAN POP-BY ASSEMBLY DAYS	<input type="checkbox"/>
DETERMINE THE DELIVERY DAYS	<input type="checkbox"/>
PLAN FILMING DAYS (GETTING B-ROLL FOOTAGE)	<input type="checkbox"/>
MAP OUT THE DELIVERY ROUTES (MAPQUEST.COM)	<input type="checkbox"/>
ASSIGN THE DELIVERY ROUTES	<input type="checkbox"/>
LOAD UP YOUR CAR WITH POP-BY'S AND FILM IT	<input type="checkbox"/>
DELIVER POP-BY'S	<input type="checkbox"/>
TEXT CLIENTS WHEN YOU'VE DELIVERED IF THEY DO NOT COME TO THE DOOR	<input type="checkbox"/>
IF ASSISTANT DELIVERED THE POP BY, BE SURE TO SEND A PERSONALIZED TEXT	<input type="checkbox"/>
ASK CLIENTS TO POST ON SOCIAL MEDIA	<input type="checkbox"/>
REPOST & RESPOND TO TEXTS, SOCIAL MEDIA POSTS, ETC	<input type="checkbox"/>
REAP THE MARKETING BENEFITS!	<input type="checkbox"/>







