



REFERRAL MACHINE:

HOW TO BOOK 25 APPOINTMENTS A WEEK —NO MATTER WHAT!

Building a Dynamite Referral Network on Face-to-Face Meetings

Javier Tello



COMPASS



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At a GLANCE

When Javier Tello got into real estate, his sphere of influence was limited. While too many new agents are timid towards networking, Javier dedicated himself to scheduling 25 face-to-face appointments every single week, no matter how far he had to go. The results showed immediately, and they've only gotten better as he's maintained this practice for the last decade.



**Houston,
Texas**

PRIMARY MARKET



\$475k

AVERAGE PRICE POINT



25

YEARS IN REAL ESTATE

2022 PRODUCTION STATS

173

TRANSACTIONS

\$67,000,000

SALES VOLUME

\$1,900,000

GCI

CORE CLIENTELE

✓ **Wide range**

PRODUCTION

40% | 60%

Buyers | Sellers

TEAM STRUCTURE

✓ **11 agents**
✓ **1 staff member**

Javier ON COACHING



So far, my experience has been phenomenal. By being open minded and with the assistance of my coach, I have been able to adopt new ideas and SOPs that have brought my business to the next level. Coaching has given me the opportunity to mastermind with other successful agents around the country and adopt some of their ideas. Adding Tom Ferry coaching to my business has been the best blessing to my business.



BY THE NUMBERS

90%

Of business is generated from referrals (2022)

25

Past client and sphere appointments per week goal

370

Contacts tagged as past clients in database

\$500-700

Per client closing outing

\$100,000

Total annual marketing budget for meetings, events, and promotion





THE STORY

Clients are not statistics; they need to be nurtured with care and high-quality interactions. That's what Javier Tello believes, and it goes for not just his past and current clients but also the broader sphere around him. It's this principle that has led him to create such a successful referral-based business. Every client has a unique story, and by tapping into these narratives, he transforms his work into a passion project.

Before venturing into real estate, Javier did a stint in accounting, but he quickly realized it wasn't his true calling. Recognizing that he had hit a career plateau, he decided to explore other opportunities. One day, he walked into a local real estate school to inquire about obtaining his license, and six months later he walked out into the industry. Javier firmly believes that he's in the right place, a profession that allows him to assist and connect with people on a profound level.

The initial years in the real estate industry were a challenge. His initial sphere of influence was limited, so building up his clientele meant proactively engaging with new people and seeking guidance from mentors. One of his mentors kept urging him to broaden his network. With dedication, he threw himself into networking, attending events and gradually becoming more comfortable with the process.

Today, Javier has more than 370 clients who he regularly maintains contact with. His goal is to secure 25 face-to-face appointments every week, a practice he's had in place for over a decade, and the results speak for themselves.



THE STRATEGY

IT'S ALL ABOUT FACE TO FACE

- Face-to-face meetings are the cornerstone of Javier's strategy.
 - Javier firmly believes that without in-person meetings, he's not effectively carrying out his responsibilities. As a result, he diligently ensures that his calendar is filled with numerous appointments.
- Javier has a passion for golf, and he cleverly utilizes this interest to his advantage.
 - He often arranges foursome golf outings with clients, allowing him to engage with three clients simultaneously.
 - He makes sure these events have an extended duration, providing ample time for meaningful interactions.
- He also hosts regular happy hours, typically every two weeks, with an average attendance of 12 people.
 - Remarkably, about 60% of these attendees are new faces, which helps him expand his network continuously.
 - During football season, the numbers tend to rise even further.
 - While Javier generously buys a round, he doesn't always cover the entire tab, underscoring his relational approach.
- Javier prefers events and celebrations over traditional gifts.
 - Always choose direct, in-personal interactions to raise the likelihood of referrals.

25 APPOINTMENTS A WEEK

- Javier has made scheduling 25 appointments each week the foundation of his business for over a decade.
- He relies on a dynamic spreadsheet to meticulously track his daily, monthly, and yearly progress.
- Javier's dedication to those 25 appointments knows no bounds; he's willing to drive long distances for even a 15-minute face-to-face meeting.
- In these interactions, he places the spotlight squarely on the client, deftly steering the conversation with questions and ensuring it remains focused on their needs.
- Before parting ways, he leaves behind a business card as a tangible reminder of their meeting.
 - Every day, he leaves home with 20 business cards in his pocket with the intention of giving them all away by the end of the day.



THE STRATEGY

- Javier's choice of meeting locations is diverse, encompassing coffee shops, restaurants, and lunch appointments.
- On Wednesdays, Javier prefers to remain in the office, utilizing this time for agent training.
 - He trains his agents in the morning until lunch. After lunch, he's open to continue going on appointments, but he doesn't compromise on getting face-to-face.
- A book that has greatly influenced his approach is "How to Win Friends and Influence People."
 - Javier applies its principles by making every interaction about the other person.

FREQUENCY AND METHODS OF CONTACT

- Ideally, he strives to see current and past clients at least twice a month, fostering ongoing relationships and connections.
 - At a minimum, he ensures a face-to-face interaction occurs twice a quarter or, at the very least, twice a year.
- He sends out a magazine every six weeks, as well as a weekly email newsletter which features community-centered videos.
 - These communications not only provide valuable information but encourage business referrals.
- To manage client relationships, he relies on his CRM, Follow Up Boss.
 - He has 370 client contacts.
 - In his referral prospecting approach, he adheres to a simple rule: "If I don't see them, I move on," recognizing that his efforts are most effectively invested in fruitful opportunities.
 - He has cultivated strong relationships with approximately 80% of the individuals within his CRM system.

A CLOSING DINNER INSTEAD OF A GIFT

- He firmly believes in celebrating the success of a transaction through a Closing Dinner, where he takes his clients out to a fine restaurant.
 - To ensure their comfort, he arranges for a driver to pick them up and offers a selection of restaurant options.
 - This special dinner occurs approximately 45 days after the closing, providing an opportunity for further connections to develop.



THE STRATEGY

- He previously tried giving closing gifts but found this to be ineffective at forming lasting relationships.
 - He realized that generic gifts, like a basket costing less than \$100, were not meaningful or memorable to clients. Instead, his goal is to leave a lasting impression, ensuring that his clients remember him through a meaningful experience.

CONFIDENCE IN ASKING FOR A REFERRAL

- Javier's confidence in asking for referrals stems from his dedication to self-development and career growth.
 - He is an avid reader, constantly seeking ways to transform his mindset and enhance his approach.
- Interestingly, even when he buys wine at a store, Javier takes the opportunity to engage in conversations with people.
 - He offers recommendations, shares a dialogue, and provides them with his business card.
 - His approach is simple but effective: "Hey, if you don't like it, call me, and I'll give you the money back. If you like it, just text me back."
- Javier always tries to engage in conversations where both parties are genuinely passionate about the subject as opposed to small-talk which lacks enthusiasm.
 - He believes that starting with your passion makes the subsequent request for referrals more natural and organic.
- Ultimately, Javier's confidence boost came primarily from a mindset shift, a crucial factor in his success. What was once awkward has become effortless, and he often begins meetings with engaging stories, creating a comfortable and relatable atmosphere for his clients and associates.

Javier's 3 Action Items **FOR SUCCESS**

1

Be yourself! Determine what you are good at and what you are passionate about and incorporate that into your business. You will find like-minded and like-passionate people and conversations will be easy.

2

Remember that it's not about you! It's always about the client and service.

3

Don't think about the money. This business is about giving and being of service first.

6 Things Javier Will Do **MOVING FORWARD**



1

More video footage to send to his SOI about the best places to drink, eat, and visit. (Personalized to them).

2

Add one or two more events (face-to-face) a year, in addition to his Spring and Xmas events.

3

He is adding a coed happy hour every quarter. (So far it has been guys only).

4

Start a neighborhood Beer and Taco Day. This event will be in his driveway with a taco truck and a beer truck.

5

Promote/sponsor a TopGolf tournament benefiting a local charity.

6

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

Javier's TOOLKIT



Newsletter Example

Example of Javier's newsletter to his past client database.

Overview of Week

Example of Javier's calendar and time-blocking systems.

Activity Tracking

Example of Javier's activity tracking and CRM interface.



Javier Tello

Realtor/Team Lead

Your Dreams, Our Mission!

www.TheTelloGroup.com

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Hello Javier,

When you find a professional you trust, you want to get as much value from that person as possible. That is especially true if that professional provides excellent service.

That's why you don't get your lawn care done by a great contractor only once.

That's why you don't hire a fantastic investment advisor and use them for just one transaction.

That's why you don't see a wonderful dentist and never make another appointment.

And yet, when it comes to real estate, many people wonder what more they can expect from their real estate professional once their home has been sold and their move is done.

The answer is: plenty.

Indeed, I'm a huge believer in providing ongoing services to my clients in the months and years between their moves. Those services can include annual checkups, client appreciation events, being available when they have real estate questions, and, of course, these regular newsletters.

The bottom line: I'm here for my clients. So, think of me as you would your favorite mechanic, investment advisor, dentist, or any other professional you count on.

JavierTello

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Getting Family Members Enthusiastic about Moving

You may be excited about selling, but do your other family members share your enthusiasm? Kids can often be hesitant about, or even resistant to moving. That can make the selling process more stressful.



The good news is, there are ways to get everyone in the family keen on the idea.

One effective technique is to get everyone involved in the planning process, especially kids. Seek their input. Keep them informed. Include them in conversations. The less of a mystery the move is to them, the more comfortable they'll feel about moving.

When it comes to kids, another technique is to show them what their new neighborhood is going to be like. (Or, if you haven't purchased yet, show them the areas you're targeting.) Point out schools, parks, and other neighborhood features. That will build their anticipation.

For those family members who seem particularly troubled about moving, take the time to have a frank conversation with them. Let them relate their concerns. Sometimes having their concerns heard is all that's needed to help them feel better about selling and moving.

Of course, there's no perfect solution. But, these techniques can help get everyone in your family keen on the adventure.

Checklist for Selling your Home this Fall

If you're thinking of selling this fall, this is the ideal time to start the process. The earlier you get ready, the more successful your sale will be. It will likely go a lot smoother, too.



So, with those benefits in mind, here is a quick checklist that will guide you in preparing to list this fall:

- **Financials.** Find out how much your home will likely sell for in the current market. That calculation is made by looking at what comparable homes in the area have sold for recently.
- **Decluttering.** The more neat and spacious your home looks to buyers, the more appealing it will be to them. So, be relentless when decluttering.
- **Fixing.** If anything needs to be repaired or replaced, this is the best time to get that work done. You don't want to have to scramble to find a contractor later on.
- **Staging.** Staging is the art and science of setting up a room so that it looks attractive to buyers. Well-staged homes tend to sell faster and for a higher amount. You can stage your home yourself or get professional assistance.
- **Scheduling.** When you list in the fall, you want to make it as convenient for buyers as possible to book appointments to see your home. So, make sure you have plenty of scheduling flexibility.
- **Targeting.** Are you also buying a new home? If so, then start the process now. Decide what type of home you're looking for specifically and narrow your focus to those neighborhoods you want to get into.

Starting the selling process now gives you a head start when you list this fall. So, begin working through this checklist today.

The Role of Carrying Costs when Buying a New Home

When searching for a new home, many buyers will focus only on the list price and what they may need to offer to get the property. For example, a buyer might think, “We can get this house for \$XX. That’s within our price range!”



Of course, the selling price plays the pivotal role in whether or not you can afford a particular home. But, carrying costs should also be considered.

Carrying costs include any regular expenses related to the property. The obvious ones are gas, hydro, water, garbage, and taxes. But, there may be others. For example, a home may also have a subscription-based alarm system, high-speed internet, and hot water tank rental.

If there are common elements, such as a private street or some other neighborhood feature, there may be an annual maintenance fee.

It’s also smart to factor in predicted maintenance and repair costs, especially when buying an older home. A property that hasn’t had its roof shingles replaced in 20 years may be due soon.

So, when you’re shopping for a new home, consider what the carrying costs will be. That will help you make a more informed decision.

That being said, stretching to pay a little more in monthly costs may be worth it, if you love the home and it, (as well as the neighborhood) has everything you want.

Notable, Quotable, Quotes!

“Today’s accomplishments were yesterday’s impossibilities.”

Robert H. Schuller

“A year from now you may wish you had started today.”

Karen Lamb

“You cannot always control what goes on outside. But you can always control what goes on inside.”

Wayne Dyer

Create

August 2023 < >

M	T	W	T	F	S	S
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Meet with...

 Search for people



Time Insights

My calendars

- ☒ Javier Tello
- ☒ Follow Up Boss
- ☒ Follow Up Boss
- ☒ Tasks
- ☒ Tello Family
- ☐ Transferred from milesd@...

Other calendars + ^

- ☒ Holidays in United States
- ☒ javier.tello@compass.com
- ☐ Propertybase Invalid
- ☐ thetellogroup@gmail.com

Other calendars  

- ☒ Holidays in United States
- ☒ javier.tello@compass.com
- ☐ Propertybase Invalid
- ☐ thetellogroup@gmail.com

[illegible]

Event saved Undo X

Windows taskbar showing search bar, taskbar icons (File Explorer, Settings, Edge, etc.), and system tray (clock, date, network, volume).

