LJ Hooker Home Loans

Example: Communication Plan Template

Send | To | Cc | Subject: Thank You for Your Time – Proposal for Communications Plan

Dear [Real Estate Agent's/Principal's Name],

Thank you for taking the time to [speak with me over the phone/meet with me face-to-face] recently. It was a pleasure discussing how we can work together to support your clients, add value and enhance their property journey.

As we touched on during our conversation, I'd like to propose a tailored communications plan that can help us keep your customers informed and supported throughout the buying or selling process.

Proposed Communication Plan *[Tailor this to suit discussions with the Real Estate Principal]*

Here's an outline of how we can collaborate to stay connected with your clients:

1. **Client Introduction Process:**
    - Streamlined referral process where you introduce me as your trusted lending specialist to your clients.
    - A commitment to providing timely and personalised service for all referrals.
    - I'll keep you updated on the progress of any referred clients, ensuring transparency and alignment with their property goals.
2. **Office Displays & Listing Kits:**
    - Provide Business Cards, Window Displays and guides for front office display
    - Listing Kit, Landlord introduction and home loan flyers
3. **Digital Content:**
    - Provide newsletter content or guides with insights into home loans, refinancing, and market trends that you can share with your database.
        - Content for Buyers, Vendors, Landlords & Tenants
        - Simple banners or features articles to include in any of your existing newsletters as well as a sole introduction newsletter as your lending specialist.
        - I can provide all artwork and content messaging with your guidance on what is required for you CRM
    - Topics can include:
        - Buyers | Vendors | Landlords | Tenants
            - [Insert Here – refer to RE playbook]
4. **Open Homes, Auctions & Other Events:**
    - Attendance and support at Open Homes & Auctions with relevant home loans materials
    - Hosting informative sessions (in-person or online) for your clients to educate them on property and finance-related topics, positioning us both as trusted advisors.

I believe this collaborative approach will not only benefit your clients but also reinforce your position as a trusted advisor in the property market. I'd be happy to tailor this plan further to align with your specific goals and client needs.

Let me know a time that suits you for a follow-up discussion. I'd love the opportunity to fine-tune this plan and start implementing it with you.

Looking forward to your thoughts!

[Insert Email Signature]