



PFS 104 Activity 3 - Scheduling Sphere of Influence

1. Choose the tool that works for you
2. Schedule the first call in the current quarter
3. Ensure a call is scheduled to be made on the SOI's birthday
4. Use a reoccurring or repeating appointment to ensure the SOI shows up as part of your daily prospecting every quarter
5. Continue to build rapport and trust and inform the SOI that you will call them again in a few months.
6. Remind the SOI of your 3 critical pieces of information that you need to communicate in every interaction
 - a. Your name
 - b. What you do for a living – You are a Realtor®
 - c. If they or someone they know has a real estate need, they should call you
7. Check your calendar or tool that you choose daily so that you never miss a contact.