



THE ULTIMATE REAL ESTATE PLAYBOOK: SYSTEMS THAT WORK

A Gifting System for Reviews and Referrals

Scaling Client Appreciation by Showing Appreciation

**Brennen
Clouse**

 Real Brokerage

 @brenthebroker



At a GLANCE

Relationships are everything in this game. And relationships are built on mutual appreciation. Brennen Clouse and his team have mastered the art of fostering appreciation through a gifting system that has their clients singing their praises – and reciprocating with referrals and five-star reviews.



**Seattle,
Washington**

PRIMARY MARKET



\$981k

AVERAGE PRICE POINT



7

YEARS IN REAL ESTATE

2022 PRODUCTION STATS

109

TRANSACTIONS

\$102,000,000

SALES VOLUME

\$1,200,000

GCI

CORE CLIENTELE

- ✓ First-time buyers
- ✓ Upsizing professionals

PRODUCTION

70% | 30%

Buyers | Sellers

TEAM STRUCTURE

- ✓ **3 agents**
- ✓ **4 staff members**

Brennen **ON COACHING**



My experience in coaching has impacted my business in every single facet, from how I think about operating a successful business & team, to where I find balance between work and life. My current and past coaches have taught me accountability, leadership, and the importance of going the extra mile for my clients and my teammates. I could not be where I am today without the coaching organization of Tom Ferry.



BY THE NUMBERS

55%

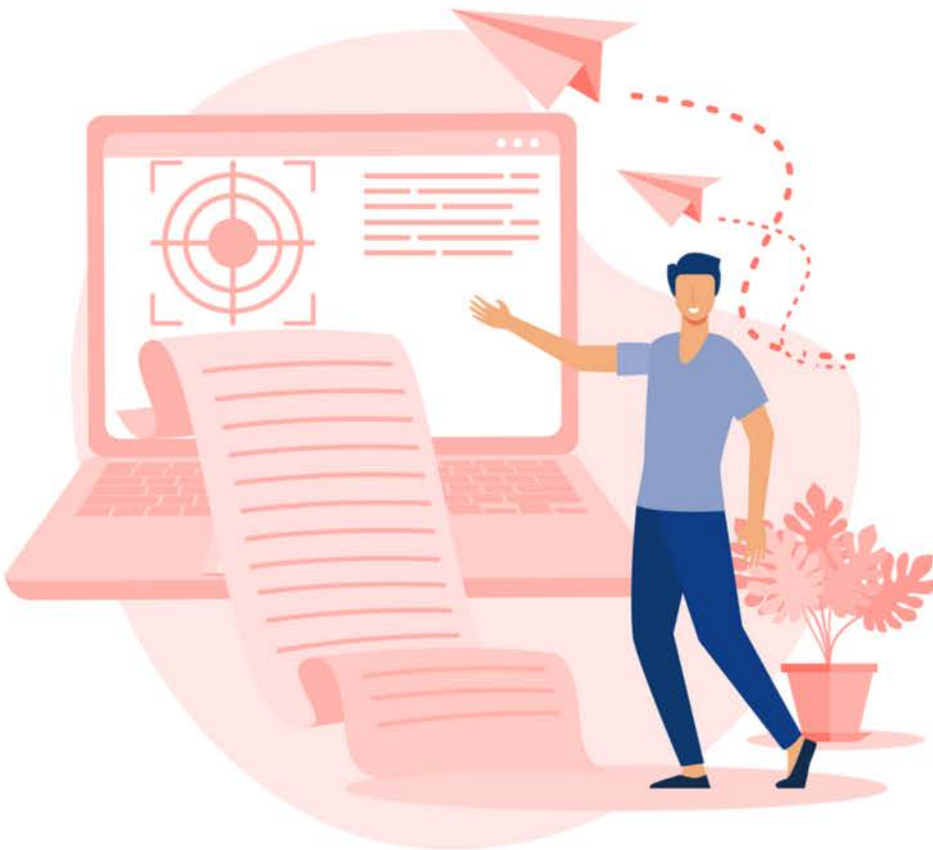
Of transactions in 2022 from past client referrals

75+

5-star reviews

\$50-\$150

Budget for closing gifts





THE STORY

As a relationship marketer for Microsoft, Brennen Clouse was gradually realizing that he didn't quite fit in with the corporate world. So, when he committed himself full-time to real estate in 2017, he knew he'd taken the right step.

Of all he had learned at Microsoft, the most important was that relationships are everything, because relationships open the door for quality service. If he was going to do this right, Brennen knew he needed to create a business where people would feel genuinely appreciated and cared for throughout the client journey.

Not surprisingly, at Microsoft he had become quite comfortable with applying technology to consumer-facing concerns. Now in his own business, Brennen and his team began leveraging technology to create a system that could massively scale client gifting.

Their goal: A stellar client experience that would result in glowing reviews, client referrals, and repeat business.

Building this kind of system began with the question: As a client, what would I need to experience during the process to make me not only happy but a loyal advocate?

But before Brennen reached that question, there were a few false starts – steps where the client might not have felt as appreciated as they needed to. Only when Brennen and his team connected the dots between what they wanted – 5-star reviews and raving client fans – did they perceive the gap.

Knowing the gap and how to fill it makes all the difference. You don't have to be an ex-Microsoft employee to know what it takes and make it happen.



THE STRATEGY

HAVE A VISION

- Brennen envisioned a gifting system that would result in 5-star reviews.
- It would be scalable because every tool and process would seamlessly interconnect.

USE TECHNOLOGY

- He created an "All About You" client intake form, hosted on Airtable, and included a bit.ly link to it in their buyer consultation follow-up email. In bit.ly, every team member can easily access it. The form helps them gather all relevant client preferences and needs to personalize their gift selection.
- By ordering gifts directly from Amazon, Brennen ensures quick and efficient delivery to his clients. Furthermore, the use of gift notes enables clients to respond with a thank you note, fostering a sense of gratitude and appreciation.
- He can also source moving boxes and supplies through Amazon.
- He provides personalized Buyers Guide notecards for each team member. The notecards include a prompt for the client to leave a review. FedEx Office prints the notecards in batches of 50.

DEVELOP PROCESSES

- The agent and other team members complete a New Contract Gifting form. It is then sent to their virtual assistant (VA) who handles ordering all the gifts.
- For the moving boxes, a kit is chosen from Amazon. The boxes are accompanied by a congratulatory script personalized with the agent's name, adding a personal touch for each client.
- Seven days before closing, they send Crumbl Cookies to the client with a note that reads, "Looking forward to a sweet close!"
- Finally, they send a personalized closing gift based on the interest or hobby the client shared in the "All About You" form.
- They also gift monthly subscriptions to maintain ongoing connection with clients.
- Finally, they send a standardized email to nudge the client toward giving a review.

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

1

Familiarize yourself with the gifting concept as presented in John Ruhlin's book, *Giftology*. (Or listen to Tom's podcast with John.)

2

When building your system, start small with what's manageable, maybe something as simple as the "All About You" intake form for all new clients.

3

Think ahead and determine who can run your system once it's developed.

6 Things Brennen Will Do **MOVING FORWARD**



1

Determine new and different ways to elicit more reviews and referrals.

2

Consider client services responsibilities as the process scales.

3

Consider weekly check-ins more consistently using a client concierge.

4

Consider new check-in and contact points post-close.

5

Formalize how to make sure buyers feel Brennen's team is the obvious choice.

6

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

Brennen's TOOLKIT



SEE SUMMIT RESOURCES FOR
BRENNEN'S TOOLKIT

Buyer Primer and Guide

The Emerald Group's flyer with QR codes to Primer Form and Buyer Guide.

List of Closing Gifts

Brennen's list of top closing gifts sourced online.

Ordering Moving Boxes SOP

The Emerald Group's example SOP for ordering moving boxes.

Ordering Crumbl Cookies SOP

The Emerald Group's example SOP for ordering Crumbl cookies for clients.