

# SECTION 6: THE POWER OF CONNECTIONS - FROM ROLODEX TO MODERN CRM

*"Opportunities are usually disguised as hard work, so most people don't recognize them."*

*—Ann Landers*

During my undergraduate years at Princeton University, I had a campus job that would profoundly shape my understanding of professional relationships. Working for the head of the Ecology and Evolutionary Biology department, I was tasked with maintaining what we'd now consider a prehistoric version of a CRM – the classic Rolodex, with its spinning wheel of possibilities and countless cards holding precious connections.

Each day, the professor would hand me a stack of cards to organize and update. At first glance, it seemed like a simple administrative task, but there was something deeper at work. Here was a distinguished professor of ecology, someone who dedicated his life to studying the interconnectedness of living systems, treating his professional network with the same meticulous care he applied to his research.

The symbolism wasn't lost on me. Just as an ecologist studies the intricate web of relationships between organisms in an ecosystem, this professor understood that his professional success depended on nurturing and maintaining a complex network of colleagues, fellow scientists, and collaborators. His Rolodex wasn't merely a tool – it was a physical manifestation of his professional ecosystem.

As real estate professionals, we need to shift our perspective. Your CRM should be viewed as a map of symbiotic relationships, where every connection represents an opportunity for mutual growth and support. When you help a first-time homebuyer find their dream home, you're not just closing a deal – you're cultivating a relationship that might lead to referrals, market insights, or future opportunities. When you maintain regular contact with past clients, you're not just following up – you're nurturing your professional ecosystem.

This is the mindset I want you to embrace as you explore CRM systems. Focus on the 'R' in CRM – Relationship. Think about how you can create and maintain authentic connections that benefit everyone involved. Success in real estate isn't just about selling properties; it's about building a network of genuine relationships where success flows naturally through mutual support and trust.

### **Key Technologies:**

- Basics: Microsoft Excel, Google Sheets, Apple Numbers
- Advanced: BoldTrail, Follow-up Boss, Buffini Referral Maker

Let your CRM be more than a digital Rolodex. Let it be a tool that helps you nurture and grow your professional ecosystem, one relationship at a time.

# 1,000 POINTS OF LIGHT EXERCISE: BUILDING YOUR REAL ESTATE DATABASE

## Overview

The 1000 Points of Light Exercise helps you build a robust, categorized database of contacts who might become clients or refer business to you. Unlike the traditional kvCore 10×10 method, we're adding hashtags to make your contacts more searchable and actionable for targeted marketing.

## Time Required

- Total time: 70 minutes
- Contact listing: 20 minutes (10 rounds × 2 minutes)
- Hashtag addition: 50 minutes (10 categories × 5 minutes)

## What You'll Need

- Paper and pen or a spreadsheet
- Timer
- Quiet space where you can concentrate
- Your phone (to look up contacts if needed)

## Instructions

### Part 1: Building Your Contact List (20 minutes)

1. Set a timer for 2 minutes.
2. For each 2-minute round, write down 10 names from ONE of these categories:
  - Round 1: Family members
  - Round 2: Close friends
  - Round 3: Neighbors (past and present)
  - Round 4: Past coworkers
  - Round 5: Service providers (hairstylist, doctor, mechanic, etc.)
  - Round 6: Parents of your children's friends
  - Round 7: Club/organization members (church, gym, sports teams)
  - Round 8: Business networking contacts
  - Round 9: Social media connections you know personally
  - Round 10: Past clients or current business connections

**NOTE:** You can change these categories that fit your needs

3. Don't overthink it! The goal is to write quickly and capture as many names as possible in each category.
4. If you can't think of 10 people in one category, just write as many as you can and move on.

### Part 2: Adding Hashtags (50 minutes)

1. Now return to each category and spend 5 minutes adding at least 10 hashtags or labels to each person.
2. These hashtags should reflect:
  - Potential real estate needs (#homeowner, #investor, #downsizer)
  - Interests (#gardener, #golfer, #winelover, #traveler)
  - Life stage (#newparent, #emptyNester, #retiree)
  - Personality traits (#organized, #adventurous, #cautious)
  - Relationship strength (#A-list, #needsNurturing, #influencer)
  - Any other characteristics that might help you tailor your marketing

### Examples of Hashtags

- Personal interests: #hiker, #foodie, #DIYer, #sportsfan, #bookclub, #techie
- Life events: #newbaby, #collegebound, #recentlyMarried, #divorced
- Client potential: #ready2023, #preapproved, #investor, #relocating, #buyup
- Demographics: #millennial, #boomer, #dogowner, #veteran, #teacher

### How to Use Your Results

After completing this exercise, you'll have:

- 100 names of people in your sphere of influence
- 1000 data points (the "points of light") to guide your marketing

Now you can:

1. Transfer these contacts to your CRM
2. Create targeted email or social media campaigns based on hashtags
3. Plan personalized follow-ups based on interests
4. Identify your A, B, and C-level contacts for frequency of outreach
5. Find common themes among your best contacts to guide networking

**Remember!**

- This database is a living document—update hashtags as you learn more
- Aim to add 5 new contacts each week to continuously grow your network
- Schedule time each quarter to refresh your hashtags based on new information
- Use these hashtags to send relevant, targeted communications rather than generic messages

The real power of this exercise isn't just in collecting names—it's in understanding the unique qualities of each person in your sphere and leveraging those insights to build authentic relationships that lead to business opportunities.

# 1,000 POINTS OF LIGHT EXERCISE: WORKSHEET

Use 1 sheet per category

Category:

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Name 1:

Hashtags:

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Name 2:

Hashtags:

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Name 3:

Hashtags:

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Name 4:

Hashtags:

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Name 5:

Hashtags:

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Name 6:

Hashtags:

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Name 7:

Hashtags:

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Name 8:

Hashtags:

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Name 9:

Hashtags:

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Name 10:

Hashtags:



# DISCUSSION QUESTIONS

Real estate brokers should think of their CRM as more than just a list of names and numbers. It's like a special tool that helps them build a "professional ecosystem" where they can grow their business and support the people they work with. Imagine you're a real estate broker. How could you use a CRM to make friends and connections that would help you succeed?

It is important for real estate brokers to see everyone in their CRM as someone they can have a win-win relationship with. It's like a two-way street where everyone benefits! How do you think this idea could change the way real estate brokers talk to their clients and find new customers?

There's a story about a professor who was really careful about keeping his Rolodex organized. Even though it seemed like a boring task, it showed how much he cared about his professional relationships. How could keeping your CRM neat and updated, even if it takes some time, help you become a successful real estate broker in the long run?



# THE POWER OF CONNECTIONS QUIZ

Fill in the blanks to test your understanding of relationship management in real estate:

1. During the author's undergraduate years, he maintained a classic \_\_\_\_\_ for a Princeton professor, which represented a prehistoric version of a CRM system.
2. The professor understood that his professional success depended on nurturing and maintaining a complex network of \_\_\_\_\_, fellow scientists, and collaborators.
3. Real estate professionals should view their CRM as a map of \_\_\_\_\_ relationships, where every connection represents an opportunity for mutual growth.
4. We should focus on the '\_\_\_\_\_' in CRM, which stands for Relationship.
5. When you maintain regular contact with past clients, you're not just following up – you're nurturing your professional \_\_\_\_\_.
6. The 1000 Points of Light Exercise helps you build a robust, \_\_\_\_\_ database of contacts who might become clients or refer business to you.
7. In the exercise, you should spend \_\_\_\_\_ minutes adding at least 10 hashtags or labels to each category of contacts.
8. Examples of hashtags might include personal interests like #hiker, life events like #\_\_\_\_\_, client potential like #investor, or demographics like #millennial.
9. After completing the exercise, you'll have 100 names of people in your sphere of \_\_\_\_\_ and 1000 data points to guide your marketing.
10. This database should be treated as a \_\_\_\_\_ document that requires regular updates and refreshing of hashtags.

Words to use: ecosystem, categorized, living, Rolodex, influence, R, colleagues, 5, symbiotic, newborn