

Sphere of Influence Worksheet



Your sphere of influence (SOI) is the cornerstone of your real estate career. It includes people who know, like, and trust you—connections that can become valuable leads and referrals. This guide will help you identify, organize, expand, and engage your SOI authentically and effectively, regardless of your background or experience.

Step 1: Identifying Your Sphere of Influence

Think beyond immediate family and close friends. Your SOI can include anyone you've had positive interactions with. It's about exploring personal connections, professional connections, community figures, digital connections and much more. *There's a whole page of ideas of people you may want to include at the end of this guide.*

Step 2: Organizing Your Sphere - Create a Master List

Use a spreadsheet or CRM (e.g., BoldTrail/KVCore) to compile your contacts. Record names, phone numbers, emails, social handles, and how you know them. Remember, one of these people may very well be your first client...let's keep it organized!

Recommended Tools

Google Sheets/Excel/Numbers - Simple and effective for tracking contacts

BoldTrail/KVCore - Ideal for segmenting and managing relationships

Social Media Lists - Facebook/Instagram friend lists are a great way to track!

Step 3: Engaging Your Sphere

This is often the most uncomfortable part of being a new agent, but if done right, it's what will lead you to your first (and many more) deals! But it doesn't have to be everything all at once. The key is a consistent touch, not overwhelming attack. Here's a few tips for you to get on the right track:

- **Introduction post** - a must for any new agent. Let's let the world know you're in real estate and you're happy to help. But it's not a "post and forget it", instead I implore you to engage with every person who likes or comments on your post across each platform. Ask them how they're doing, strike up a conversation...not sales-y, but authentic.
- **Business Drop-ins** - Have your welcome letter/card at the ready and go see some of your favourite businesses. Coffee shops, clothing stores, anywhere you do business, and drop off a card and your letter (a inexpensive clever gift normally does wonders too!)

- **Neighbourhood Door Knocking** - Start with your area and go in with the right mindset, a cheerful attitude and a simple message (your intro letter/card) and you'd be surprised at the reception you'll get. Prep yourself with a fun fact about the neighbourhood real estate market, and you'll instantly gain credibility and strike up a conversation. **Flyer Drops** - An introductory flyer is a great way to get the word out. If cost is a concern, then target a couple areas that you want to target. But the key with any mailer/flyer drop is consistency. People need to see your message multiple times, so budget for one a month to the same area for a while.
- **Coffee Talks** - It's a great time to connect (or re-connect) with people you like. Invite them out for lunch or coffee, and let them know what you're up to. It doesn't just have to be potential clients either...other realtors, mortgage reps, business contacts, whatever. A good rule of thumb to start is one per week.

These are just some ways to engage your SOI, but really there are many more. Just be active, be social, communicate and connect...the payoff will be a living, breathing database that will keep your lead pipeline healthy for years!

Your Tasks:

- Create a trackable list of your SOI. You can use a spreadsheet, kVCore or even a piece of paper! Just make sure you have room to keep some notes.
- Fill that list with a minimum of 100 names. There's suggestions of people you can write down on the next page.
- Create your introductory message. I've included a sample letter, postcard and social post idea in this package - feel free to use as inspiration, but get creative, make it authentically "you"!

SOI Suggestions



Personal Connections

- Immediate family
- Extended family
- Childhood friends
- High school classmates
- College/university friends
- Neighbors (current and former)
- Parents from school/PTA
- Family friends
- Friends from social clubs
- Friends of friends

Professional Connections

- Former coworkers/supervisors
- Industry mentors
- Networking group members
- Former clients from previous roles
- Local business owners
- Vendors and suppliers
- Service providers (doctor, dentist, hairstylist)
- People you've hired (house repairs, photographers, anything!)

Community Involvement

- Religious group members
- Volunteer group contacts
- Sports teammates
- Hobby/interest club members
- Event organizers
- Alumni associations
- Local charity workers
- Gym trainers and members
- Community center staff
- Parents from kids' sports teams

Digital Connections

- LinkedIn connections
- Instagram followers
- Facebook friends
- Online forum members
- Email newsletter subscribers
- Real estate FB group members
- Twitter/X followers
- Local influencers
- YouTube subscribers
- Members of online networks

- Personal trainers/fitness instructors
- Nutritionists/dietitians
- Local artists and photographers
- Daycare providers/preschool teachers
- Dog walkers/pet groomers/veterinarians
- Property managers/landlords
- Local bloggers/influencers
- Home stagers
- Landscapers/Contractors
- Vet/Pet Care

- Moving company owners/managers
- Yoga/Pilates instructors
- Barbers/stylists at popular salons
- Tailors/dry cleaners
- Farmers' market vendors
- Local brewery/winery owners
- Car Dealers/Mechanics
- Music teachers/instructors
- Travel agents
- Nonprofit organization leaders

Sample Intro Letter



Hello!

I hope this letter finds you well! My name is [Your Name], and I'm excited to introduce myself as a new real estate agent with Re/Max Crown Realty here in Sudbury. As a proud member of Sudbury's largest and most trusted real estate brokerage, I am thrilled to embark on this journey of helping clients find their dream homes and make sound investments in our vibrant community.

A little about me: [Insert a brief personal background. Example: "I've lived in Sudbury for [X] years and have always been passionate about helping people navigate important life decisions. My background in [Previous Career/Experience] has equipped me with valuable skills in communication, negotiation, and problem-solving."]

I am committed to providing exceptional service with a personal touch, backed by the incredible resources and network that Re/Max Crown offers. Whether you're considering buying, selling, or simply curious about the current market, I'm here to provide guidance every step of the way.

Here are a few ways I can help:

Home Value: Curious about your home's current market value? I offer complimentary home evaluations.

Buying Guidance: Looking for your dream home? I can help you navigate the buying process with ease.

Market Updates: Interested in market trends? I provide regular updates on local real estate conditions.

I would love the opportunity to reconnect and hear how you've been! Feel free to reach out to me anytime at [Your Phone Number] or [Your Email Address]. If you know anyone who may need real estate advice or services, I'd be truly grateful for your referral.

Thank you for taking the time to read this letter. I look forward to staying in touch!

Warm regards,

(Signature & Details)

Sample Intro Media



📣 Exciting News! 📣

I'm thrilled to announce that I've officially joined Re/Max Crown Realty as a licensed real estate agent! 🏠🔑

Whether you're thinking about buying, selling, or just curious about the market, I'm here to help guide you every step of the way. Backed by the largest and most trusted brokerage in Sudbury, I'm ready to put in the work to help you achieve your real estate goals!

☎️ Let's chat: [Your Phone Number]

✉️ Email me: [Your Email Address]

📱 Follow along: [Your Social Media Links]

Looking forward to connecting with you! 💙

#SudburyRealEstate
#ReMaxCrown #NewAgent
#DreamHome
#LetsTalkRealEstate
#SudburyHomes
#SudburyBusiness



Hello, [Neighborhood]!
I'm [Your Name], your new local Realtor® with Re/Max Crown Realty!

I'm excited to help you and your family with any of your real estate needs. Whether you're looking to buy your dream home, sell your current one, or just stay informed about the market, I'm here for you every step of the way.

Your Name
Realtor®
Re/Max Crown Realty Inc., Brokerage
705.560.5650

Sample Postcard to Drop
(very basic...make it pop with your personality!)

Sample Social Media Post