



Client Retention Planner



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from "Real Estate Evolved"

INTRODUCTION TO THE DRIP CAMPAIGN

In real estate, staying on your clients' minds is a powerful way to grow your business. According to the 90/10 principle, the top 10% of agents maintain close, ongoing relationships with their past clients and, in turn, generate up to 90% of the best referrals. This "Client Retention Planner" is designed to help you be part of that top 10%. By keeping your follow-ups structured and personal, you ensure that your name remains on your clients' lips whenever real estate opportunities arise.

Section 1: Monthly Follow-Up Calendar

Use this section to map out weekly tasks, ensuring a simple, steady cadence of communication. Below is a sample layout; feel free to customize it.

1. Week 1

- **Task:** Check on recently closed clients from the last two months.
- **Goal:** Ask about how they're settling in, address any ongoing needs, and ensure they feel valued.

2. Week 2

- **Task:** Property check-in for older leads (6-12 months back).
- **Goal:** See if they've changed their mind or have questions about market conditions.

3. Week 3

- **Task:** Touch base with current active leads.
- **Goal:** Offer helpful market updates or highlight properties that fit their preferences.

4. Week 4

- **Task:** "Wildcard" follow-up — select a segment of your database (e.g., past open house visitors) to reconnect with.
- **Goal:** Keep your contact list warm, relevant, and engaged.

Fillable Prompts:

- Who will you contact in Week 1?
 - Any special notes or concerns for Week 2?
 - What valuable market insight can you share in Week 3?
 - Which segment of your database will you target in Week 4?
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Section 2: Anniversary & Special Occasions

Personal touches go a long way toward building lifelong relationships. Use this section to track important dates and events, so you can celebrate with your clients.

- **Move-In Anniversaries:** Mark each closing date, set a reminder for a quick “Happy Home Anniversary!” call or message.
- **Birthdays and Special Events:** Gather client birthdays or other milestones (promotions, new family additions). Send a handwritten note or a small gift to show you care.

Fillable Prompts:

- List upcoming anniversaries or special occasions in the next 3 months.
- What type of personal message or gift would you like to send?

Section 3: Anniversary & Special Occasions

Referrals are the lifeblood of a thriving real estate business. However, asking for referrals should always feel genuine and polite.

- **Sample Script #1:**

"I'm so glad to see how well you've settled in. If you know anyone else looking to buy or sell, I'd be honored to help them too."

- **Sample Script #2:**

"I truly appreciate working with clients like you. If you ever run into friends or family who mention real estate, feel free to give them my number."

- **Thanking Referral Sources:**

Promptly send a thank-you note or small token of gratitude whenever someone refers a client your way. A personal touch highlights your genuine appreciation.

Fillable Prompts:

- Write down a go-to referral request in your own voice.
- List people you'd like to thank for past referrals. How will you thank them this quarter?

Section 4: Quarterly Review

Every few months, step back and measure your progress. Determine which relationships are thriving, which ones need attention, and how many referrals have come through.

1. Retention Outcomes

Questions to Ask:

- Which clients referred someone to me this quarter?
- Did I miss any anniversaries or special events?
- Which relationships feel like they're drifting away?

Section 4: Quarterly Review

Every few months, step back and measure your progress. Determine which relationships are thriving, which ones need attention, and how many referrals have come through.

1. Retention Outcomes

• Questions to Ask:

- Which clients referred someone to me this quarter?
- Did I miss any anniversaries or special events?
- Which relationships feel like they're drifting away?

2. Action Steps

- Make specific plans to re-engage with clients you've missed.
- Celebrate referral successes by sending thank-you gifts or messages to the clients who helped you grow.

Fillable Prompts:

- Record your quarterly referral numbers.
 - Note any "to-do" items for clients who may be slipping off your radar.
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Conclusion

Client retention isn't a one-time effort; it's an ongoing habit. By following this planner, you're not only building a more resilient business—which we'll explore in greater detail in Chapter 6—but also forging relationships that last well beyond the closing table. Keep refining your approach, stay in consistent contact, and watch your referrals multiply as you maintain meaningful ties with your past clients.

Monthly Layout & Reflection

Month	Who to Contact	Date	Reason for Follow-Up	Next Steps or Notes
Month 1				
Month 2				
Month 3				

Reflection Questions:

- Did you connect with everyone on your list this month?
- Which clients responded best, and why?
- Any new referrals generated?

(End of Client Retention Planner – Chapter 5)

Stay purposeful in your follow-ups, personalize your communication, and watch your real estate career flourish through dedicated client care.

5. Wrap-Up

Track open rates, click-through rates, and response rates. If certain emails are underperforming, adjust the subject lines, update the content, or modify the timing. With consistent tweaks and ongoing communication, you'll strengthen your connection with leads and empower them to take the next step in their real estate journey.

Use this cheat sheet daily for quick, copy-paste-ready ideas. Remember: Personalized email outreach is a powerful extension of your brand—keep it genuine, relevant, and cohesive.

ABOUT LUCAS



DR. LUCAS ROOT, PH.D.

Lucas is a renowned technologist, community builder, and advocate for ethical AI integration. With a robust background in physics, mechanical engineering, and mathematics, he blends technical expertise with a deep understanding of human systems. As the CEO of SGIC Consulting, Lucas has guided countless businesses toward innovation, empowering leaders to leverage technology for meaningful transformation. As host of the Elements of Community podcast, Lucas explores the art and science of building thriving communities, while his groundbreaking work in AI and sustainable business practices has earned him recognition as a thought leader in ethical AI integration and leadership development.