Sphere Rating and Action Plan

At the end of this exercise

- You will have analyzed and categorized 20 client/sphere contacts on 4 characteristics
- Divided contacts into priority lists
- Have a client/sphere action plan

You have:
a paper list of 20 contacts and a pen

Four characteristics
C = how much they care about you and your success
S = how many people they know or influence
R = how much they know about/care about/ or own real estate
U = Urgency

For each, rate 0-3, 3 being the highest
Rate each one, one category at a time
Move fast, don't over think or talk about it, if you don't know move on

Sphere Rating

	How much do they care about you?
C3	they care very much, best friends, family
C2	care somewhat, casual friends and people you've known for a while
C1	probably don't care much or you don't know
C0	they don't know you from Adam or Eve or you know they don't like you
	How many people do they know?
S3	they know everyone in town
S2	normal amount of friends and contacts
S1	loners
S0	cloistered monks or nuns
	How important is real estate to them?
R3	own lots of property, talk about it all the time, know a lot
R2	own two or more homes, sometimes talk about it, somewhat knowledgeable and sophisticated
R1	may or may not own a home, you don't know if they're interested
R0	full time RV residents, don't believe in settling down, don't believe in property rights
	How soon are they ready to buy or sell real estate?
U3	Want to buy or sell within 4 months, highly motivated
U2	want to buy or sell within 1 year, somewhat motivated
U1	"sometime in the future", > one year
U0	Never, absolutely never will, can, or should own real estate

For any of these, if you don't know, you have to find out, esp. the "U" category

Now, total all the points for each person in your Sphere and circle the total for each.

Sphere Action Plan

	Total Points	List	Contact
Max	12	A	weekly
	11	A	minimum bi-weekly
	10	A	minimum bi-weekly
	9	B	monthly
	8	B	monthly
	7	B	monthly
	6	C	quarterly
	5	C	quarterly
	4	C	quarterly
Min	0-3	N/A	less often

Next Steps
- Get them into Top Producer or other database/contact manager
- Enter and rate your full 200-500 Sphere
- Create a portable version for your A list sphere
- Starting calling

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