



Converting Listing Agents Playbook

A loan officer's guide to prospecting **listing agents**



Table of Contents

Section 1: Strategic Mindset: Become Valuable Before You Become Visible	3
Section 2: Prospecting Scripts	4
Section 3: Automated Systems and Cadence	6
Section 4: Best Practices for Script Mastery	7
Section 5: Follow-up Conversation Sequences	8
Section 6: Execution Blueprint	9
Section 7: Key Takeaways	10





Strategic Mindset: Become Valuable Before You Become Visible

Listing agents care about three things:

1 Faster closings and fewer surprises

2 Preapproved, serious buyers for their listings

3 Marketing exposure that helps them win new listings

1 Visibility

Stay top of mind without being pushy.

- **Connect and engage** with listing agents on LinkedIn, Instagram, and Facebook.
- **Turn on posting notifications** to like, comment, and share their wins.
- **Congratulate them on new listings** with a comment or video message.

"That property looks incredible – love the curb appeal! If you need a preapproved buyer connection, let me know."

2 Velocity

Create momentum with consistent, low-friction contact.

- **Schedule bi-monthly face-to-face lunches** to talk market data, not rates.
- Attend closings and **present a co-branded gift** – then share a joint post thanking the agent publicly.
- **Send weekly short texts** with talking points agents can reuse in their client conversations.

"Today's stat: Median home prices up 3.1%, but seller credits are up 40% – great news for motivated buyers."

3 Value

Offer tangible resources that make agents look better to sellers.

- **Show them how Embrace can issue a Property Value Certificate (PVC) for a listed property** and provide financing based on the certified value, regardless of the appraisal price.
- **Introduce Guaranteed On-Time Closing (GOTC)** to protect their sellers.
- **Enroll them in CRM journeys**, like ListReports or co-branded drip campaigns.
- **Co-host listing webinars** or first-time seller workshops online.

PRO MINDSET

The key to converting listing agents isn't chasing – it's adding asymmetric value before you ask for business.



Prospecting Scripts

1 of 2 ➔

SCRIPT 1

"The How Did You Choose?" Challenge

This framework redefines the traditional "coffee ask."

"Hey [Agent Name], I'm reaching out because I'm doing a quick project to better understand how top listing agents decide which lenders they work with. Could you share how you met and got to know the lender you currently refer your buyers to?"

Why it works: This question removes pressure. You're not selling; you're studying. Agents drop their guard – and often reveal what actually builds trust and partnership.

SCRIPT 2

Listing Agent Outreach

Triggered when you see a new listing hit the MLS or an agent post it online.

"Hey [Name], saw your new listing at [Address] – beautiful property! I've got a few preapproved buyers who might be a fit. Would it be helpful if I sent you their parameters and preapproval letters? Either way, congrats on the listing – looks like it's going to move fast."

Follow-up idea: Offer to create a co-branded open house flyer with affordability scenarios.



“

Don't ask why they pick someone –ask how they met them.*

– Stacey Brown Randall,
The Referable Client
Experience



Prospecting Scripts

◀ 2 of 2

SCRIPT 3

Open House Collaboration Ask

"Hey [Name], I noticed you have an open house coming up this weekend. Would you be open to letting me co-sponsor it? I can provide flyers showing buyers how different loan options could make your listing more affordable. This could help drive more engagement for you."

Pro Tip: Bring snacks, signage, or a QR code linking to your online preapproval app.

SCRIPT 4

Broker Introduction Ask

Use this when trying to scale your influence inside an agent's office.

"Hey [Name], we've had such a smooth process together – thank you again for your partnership on [address/transaction]. Do you think it'd make sense to meet your broker or team lead to see how I can support the whole group? I've got a few ideas on co-marketing and events that could drive more listing volume for everyone."

SCRIPT 5

Agent Video Collaboration Pitch

"Hey [Agent Name], I'm putting together a quick video series featuring top local agents sharing how they market listings in today's market. You're one of the best in [market area] – would you be open to co-recording a two-minute clip? I'll handle editing and promotion – it's a great way to get both our brands in front of local buyers and sellers."

Result: You get visibility across their audience, and they get free marketing content.

PRO MINDSET

When you bring real assets, you stop being just another lender and start becoming part of their marketing engine.





Automated Systems and Cadence

TACTIC	TOOL/EXECUTION	FREQUENCY
Social Media Notifications	Engage within 24 hours of every agent post	Daily
CRM Journey	Add listing agents to co-branded drip campaigns (ListReports, Homebot, etc.)	Ongoing
Face-to-Face Lunch	80% personal, 20% business	Every 60 days
Attend Closings	Bring co-branded borrower gift	Every transaction
Co-Host Events	Joint housewarmings or employer lunch-and-learns	Quarterly
Listing Alerts	Use MLS + social notifications to trigger reach-outs	Weekly
Gratitude Retracing	Handwritten notes or video “thank-you” post-close	24-48 hours post-closing
Capture Share Review	Track referral mix and growth rate by agent	Bi-monthly



Best Practices for Script Mastery



Don't read scripts – rehearse them.

Practice tone and flow so it sounds conversational.



Lead with curiosity, not commission.

Ask questions that make agents talk about their listings and goals.



Listen more than you pitch. Treat every prospecting call as market intelligence gathering.



Record and review calls. Analyze tonality, objection handling, and emotional moments.



Refine weekly. Update scripts based on what language resonates.





Follow-up Conversation Sequences

Post-Close:

"Hey [Agent], I just wanted to say how much I appreciated our teamwork on [Property]. Your communication was next-level – I'd love to send you a quick video testimonial to post if you're open to it."

PRO MINDSET

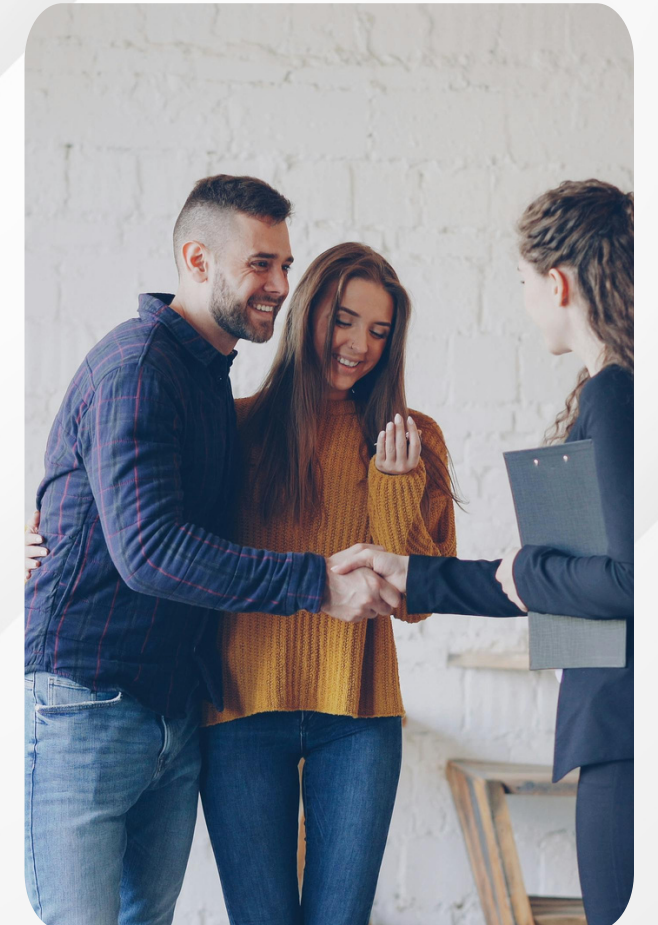
Scripts don't close deals – delivery and follow-up do.

Two Weeks Later:

"By the way, I'm hosting a quick Zoom for agents on how to use preapproval videos in listing presentations – would you like the invite?"

One Month Later:

"Saw your new listing – looks fantastic! Want me to run an affordability breakdown flyer for your next open house?"





Execution Blueprint

WEEK	FOCUS/AREA	ACTION ITEMS
1	Visibility	Connect on social, engage with 10 listing agents
2	Initial Outreach	"How did you meet?" challenge calls
3	Collaboration	Offer joint open house or video
4	Gratitude	Send three handwritten thank-you notes
5	Leverage	Ask for introductions to their broker or team
6	Scale	Add top 10 to CRM journeys and drip content





Key Takeaways



Stop selling – start studying.

Ask agents how they built their best lender partnerships.



Lead with contribution, not coffee.

Bring buyers, tools, or marketing assets first.



Systemize consistency.

Set automated reminders to engage, follow up, and express gratitude.



Show them, don't tell them.

Co-create videos, flyers, and events that put them in the spotlight.



Turn relationships into introductions.

Your best listing agent ally can open five new doors.



PRO MINDSET

Less Pitch.
More Proof.



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