



Who Are the People in Your Business?

Hundreds of contacts aren't a strategy. Start by knowing who is actually there.

Your database gets a lot easier to use when every name isn't treated the same. This isn't about rating people. It's about remembering the relationship you actually have with them.

START WITH THE PEOPLE ALREADY CONNECTED TO YOUR BUSINESS The old business-planning material separates several relationship and referral sources. Use those buckets as a starting point—not a rigid classification system.

PAST & CURRENT CLIENTS People you've helped before, people you're helping now, and repeat clients.

REFERRAL RELATIONSHIPS People who have referred business to you—or naturally could because they know and trust your work.

AGENT RELATIONSHIPS Agents you've worked with, exchanged referrals with, met through transactions, or want to stay connected to.

BUSINESS / PROFESSIONAL NETWORK Lenders, title, insurance, contractors, builders, attorneys, accountants and other professional relationships.

PERSONAL SPHERE / C.O.I. Friends, family, neighbors, community relationships and people who know you outside a transaction.

NEW CONNECTIONS People you've met through open houses, events, prospecting, online inquiries or other business activity.

THE QUESTION ISN'T: "HOW BIG IS MY DATABASE?" A better question is: "Do I know who these people are, how I know them, and whether the relationship deserves attention?"



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NOW SORT FOR ATTENTION—NOT IMPORTANCE Everybody matters. Not everybody needs the same kind of follow-up this week.

STAY CLOSE

People where a real relationship already exists. Don't accidentally disappear.

RECONNECT

Good relationships that have gone quiet simply because life got busy.

GET TO KNOW

Newer connections where there's a reason to continue the relationship naturally.

BUILD YOUR FIRST SHORT LIST Don't start with 400 names. Pick a manageable group you can actually recognize and stay connected to.

People I want to stay close to:

People I should reconnect with:

Newer relationships I want to get to know better:

DON'T BUILD A "TOP 50" JUST BECAUSE AN OLD TRAINING MANUAL SAID 50. The source material used a Top 50 concept for closer client relationships. The useful idea isn't the number—it's identifying the people you genuinely don't want to lose touch with.

ONE LAST FILTER

Would I recognize this person if they called me today?

☐ YES ☐ NOT YET

Do I know why they're in my database?

☐ YES ☐ NOT YET

Is there enough context here for me to reach out like a human—not a marketing campaign?

☐ YES ☐ NOT YET

Your database isn't a pile of leads. It's a map of relationships.