

Referral Generation Playbook

The Art of Directing: How Top Agents Build Trust & Close with Integrity | By Khadija El Otmani

The real work begins after the transaction closes. This playbook gives you a structured rhythm for post-deal follow-up, staying top of mind, and generating referrals naturally.

Post-Deal Follow-Up Timeline

Timing	Action	Channel	Notes
Day of Transfer	Send thank you message	WhatsApp / Call	Personal, warm, acknowledge the journey
Day 1–2	Request DLD rating	WhatsApp link	Share link, explain it helps your career
Week 1	Follow-up check-in call	Phone	Ask how move-in is going, any issues?
Week 2–3	Send market update relevant to them	Email / WhatsApp	Show you're still thinking about their investment
Month 1	Coffee or lunch invitation	In-person	No agenda — just relationship building
Month 3	Share a relevant opportunity or insight	WhatsApp	"Saw this and thought of you" approach
Month 6	Annual review / portfolio check-in	Meeting	Review property value, rental status, next moves

How to Ask for Referrals

The wrong way: "Do you know anyone looking to buy?"

The right way: Build it into a natural conversation after delivering value.

Script Option 1 — After a successful close:

"I'm really glad we got this done together. If you have any friends or colleagues thinking about Dubai real estate, I'd love to give them the same experience."

Script Option 2 — During a check-in:

"By the way, most of my clients come from referrals — it's how I know I'm doing a good job. If anyone in your circle ever needs guidance, I'm always here."

Script Option 3 — After resolving an issue:

"I know this wasn't easy, but I'm glad we worked through it. That's exactly the kind of service I want to be known for — if you ever want to share my name with someone, it means a lot."

Client Relationship Tracker

Client Name	Deal Date	Last Contact	Next Touchpoint	Referral Given?

Key Principles

- ☐ Never ask for a referral before delivering exceptional service
- ☐ Stay in touch even when there's no deal on the table
- ☐ Make the client feel valued, not used
- ☐ Track every relationship — memory fades, your tracker won't
- ☐ Be the agent they remember, not the agent they forgot

Tip: *The agent who stays present after the deal is the agent who gets referred. Consistency beats intensity every time.*