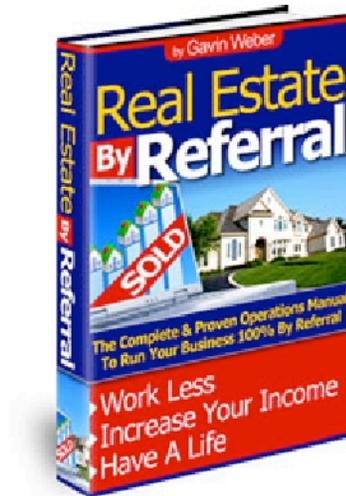


# The Real Estate By Referral Operations Manual



## The Complete & Proven Operations Manual To Run Your Business 100% By Referral

by:

**Gavin Weber**

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## Introduction

Dear Friend,

The *Real Estate By Referral Operations Manual* was created to help make your life less stressful, more organized, increase your net income, help serve your clients more professionally, to run your business effectively in less time, and even more importantly, to have fun serving your clients.

You have made a wonderful decision to invest in your business and to invest in the life you want by purchasing this manual.

Real estate can be a wonderful career as long as it does not consume your every waking moment. The *Real Estate By Referral Operations Manual* is designed to help you get not only control of your business but also your life.

This manual will teach you exactly how to run your business 100% by referral, and it will also teach you how to turn your career into a business that runs smoothly.

Nothing provided in this manual is brain surgery, and its simplicity is absolutely purposeful. It took me a a number of years to create and complete the *Real Estate By Referral Operations Manual*. Constant tweaks have been made in order to improve it. It made a huge impact on my life so it is my intention it will do the same for you.

Throughout the manual you will be receiving implicit directions on how to use this manual. It is important to note that there is one huge catch – you actually have to implement this system in order for it to work which means you will need to commit to and trust this system. It won't be hard, yet it will take a persistent effort on your part to carry it out.

By purchasing this manual you have demonstrated that you are serious about improving your business. You may want to increase your income, or have more time, or find out how to run your business as a business, or work less, or maybe you want all of these things.

I can tell you firsthand that once I committed to this system, all the above things came true for me. I was willing to make this system work, and as a result, my business works for me rather than me working for it. The success of this system

relies solely on you following through with what is taught and implementing it.

The system is wonderful, yet it is not magical. It will not just jump onto your computer and into your files and start working by itself. In fact, one reason this system works so well is because it is a lot of fun serving and connecting with other people. I purposely created a system that I would really enjoy doing because I knew if it was not fun, then I would not do it.

I also recommend following the *Real Estate by Referral Operations Manual* exactly as described. Once you feel that you have control and see how it works, some minor tweaking and changing some things into your style won't hurt, but please remember this system all ties together and major alterations could be detrimental to the overall strategy. Feel free to add your personal touch and design to the presentation appearance, but remember to keep it simple so you do not deter people from your message with too much color and design.

Test your ideas and see how effective they are before making them permanent. I advise you to follow the system and let it begin working properly before you even entertain the thought of changes. There are more than enough ideas and activities to keep you busy without worrying about creating your own.

Lastly, have fun with this process and do not get overwhelmed.

You do not have to implement everything immediately. In fact, I will highlight how best to begin implementing this program over a three week period. The *Real Estate by Referral Operations Manual* is designed to serve people in such a way that they are eager to refer you.

Your clients will become more than just clients; they will become your biggest supporters and good friends. You will also be building something much more rewarding and meaningful than a business – you will be building the life that you want!

With gratitude,

Gavin Weber

IMPORTANT P.S. – This book includes all the notes, presentations, checklists, letters, and much more involved in this system. I have had many requests for people to have these items available in a format that would be easy to transfer and implement into their own business. You can find those documents [HERE](#). As you read this book you will be able to see if they would be helpful.

It's also important to note the formatting of this book is not easy based on all these items so bare with me on the limitations of kindle. Thank you and enjoy!!!



## Overview

Your real estate career is a business, and once you start running it like a business, then and only then will you experience the benefits of owning your own business.

Until then, it may feel like your job runs you and you do not have much control.

The *Real Estate By Referral Operations Manual* is designed to change that and give you more control of your business.

Having a plan regarding exactly how you run your business and understanding why you are doing everything is crucial to the success of any business. A plan will give you direction on what you intend to achieve and details on how to achieve it.

Most people have no plan or road map, and then are surprised to find out they have not gotten anywhere.

The *Real Estate By Referral Operations Manual* consists of a way to proactively serve people on a continual business so that when they think of real estate, they will think of you.

In addition, you will be providing them with exceptional service that exceeds any past experience which will compel them to not only use your services again, but refer you to everyone they know who can possibly benefit from your services.

The *Real Estate By Referral Operations Manual* is a very well designed system that pays attention to what people want and then provides it to them.

The basis of the system is staying in touch with people and serving them whether or not they have already done business with you.

Throughout the *Real Estate By Referral Operations Manual* you will notice that you will be touching base with your past, present, and future clients quite often.

You will be serving people on a continual basis which will help you stay branded in their minds when it comes to real estate. You will not be targeting complete strangers, but instead connecting with people who are good friends and/or acquaintances.

Throughout the *Real Estate By Referral Operations Manual*, it will be reinforced over and over again that you are building relationships.

People almost always prefer to do business with people they trust and who are true professionals. This system is all about earning trust and serving people.

You will be performing activities that only a few agents have implemented on a consistent basis in their business which will separate you from the crowd and make you stand out.

Some of these activities include housewarming celebrations, yearly gratitude parties, hand written notes to clients, systematically contacting clients on select dates, providing creative small gifts expressing gratitude, and many more things that people not only love, but that are also fun to do.

The *Real Estate By Referral Operations Manual* serves people in a way that is enjoyable, impressive, and greatly exceeds their expectations.

You will be taught how to ask for referrals in a professional manner without being pushy.

You will teach people how you will be running your business and why it benefits both of you.

Due to your ongoing service and the relationships you have built with people, commission pressure will be reduced or may altogether disappear depending on how well you deliver service to people and to whom you choose to serve.

## Developing a Database

A major component of any real estate business is developing a clientele or group of people who you are offering your services to now or who you intend to offer your services in the future.

You need to know exactly who your clients are and have a detailed plan on how to serve them.

The *Real Estate By Referral Operations Manual* will provide you with exact details on how to build a database in order to keep track of all your clients and their information. The database is what will make your business have value attached to it because your clients are your biggest asset.

I will also offer my recommendations on what database programs to use and why. Your database will become the cornerstone of your business by helping you keep track of who you have contacted, when you contacted them, and a detailed plan to continually serve them.

The process of contacting your clients will be automated which will help take the remembering concern out of the equation to make sure everyone receives the same exceptional service.

Having an organized database is vital to the success of your real estate business.

## The Buyer Process

The *Buyer Process* begins from the time you get a referral all the way through closing on their home.

It will also continue integrating services you will provide for your clients after the closing.

The *Buyer Process* will include the initial consultation appointment and the presentation, instructions on how to view homes, how to deal with inspections and the inspection responses, a checklist regarding how to serve each buyer client, all the contact letters including hand written notes, hot to throw house warming parties, and much more.

The *Buyer Process* is a carefully woven plan that is very simple to implement and follow.

A detailed checklist is provided to help you stay on track and ensures that everyone receives the same great service.

### **The Listing Process**

The *Listing Process* begins once you receive a referral and continues through closing. It includes the *Listing Presentation*, all the letters, feedback forms, questionnaires, scripts, and much more.

The *Sellers Checklist* will outline the entire selling process and will highlight exactly what to do in order to stay organized and to provide everyone with the same great service.

Everything used in the *Listing Process* has been tested and proven to work effectively.

### **The Gratitude Program**

The *Gratitude Program* is just one of the many things that will separate you from the competition.

Many real estate agents provide good service during a transaction, but it is the service before and after a transaction that separates the great agents from the average agents.

The *Gratitude Program* is how you will continue to serve past clients and build relationships with future clients.

Further, the *Gratitude Program* consists of writing personal notes, hosting client parties, staying in touch through phone conversations, and much more. You will learn how to systematically serve people in a way that exceeds their expectations and impresses them to the point of earning their referrals.

The *Gratitude Program* contains most of the activities you will be doing to build your business and to create a referral stream that comes to you automatically.

People will know you spend your time serving clients rather than strangers, and they will show their appreciation with referrals.

## Getting Started

The *Real Estate By Referral Operations Manual* includes a few instrumental components that you must have in order to make the whole process work properly.

Without just one of these important components, the entire system will suffer.

Below are the items you must have to run this referral system effectively along with ideas on what programs to use and why each item is so important. Each of these items are explained further throughout the manual.

### Newsletter

You will need to choose a high quality newsletter or something entertaining to send to your clients on a consistent basis. The newsletter is just one way you will stay in touch with everyone in your database.

Once per month, you will be sending your entire database your newsletter along with a cover letter. Sending the newsletter can take a little time, but it is well worth the effort and a wonderful way to stay connected with your clients.

In an attempt to save time, it is strongly recommended to avoid creating the newsletter yourself. There are many newsletter providers that will create it for you, and the time they will save you is well worth the cost.

The newsletter needs to be sent in the U.S. mail rather than by email because people don't always read their emails, but most people read the mail that gets sent to their home from someone they know.

*Service For Life!* is the name of the newsletter that I used and recommend. It can be found at [www.serviceforlife.com](http://www.serviceforlife.com).

Using this newsletter, every month you will receive a CD with the newsletter template in Microsoft Word format, and all you will have to do is insert your information.

Then you can simply send it to a printer if your printer isn't able to print it, then pick it up, stuff the envelopes (or pay someone to stuff them), and send them out. Very simple!

One last thing, the point of the newsletter is to stay in touch, so don't get drawn into a newsletter provider's sales pitch on how to get clients. Sending a newsletter out by itself is not enough of a way to build your real estate business, but it is a great way to stay in touch and provide additional value.

Decide on a newsletter and begin ordering the system.

### **Database Program**

Choosing a database program is another very important choice and one that needs to be made quickly if you do not already have one.

The *Real Estate By Referral Operations Manual* relies heavily on organization which means a contact database program is absolutely essential. You need a program that keeps all of the basic information of your clients like addresses, phone numbers, birthdays, anniversaries, and personal notes.

You will need the program to be somewhat flexible so you can create a section that allows you to have a system to easily identify or sort your best clients (explained later).

I used the *ACT* database system. *Top Producer* ([www.topproducer.com](http://www.topproducer.com)) is also a good program, and recently I have heard wonderful things about *Salesforce.com* ([www.salesforce.com](http://www.salesforce.com)).

All of these programs are more than sufficient. *Microsoft Outlook* is also a decent option, yet I would first recommend the database programs above.

Go research a database program and decide which one would work best for you. The database is a major aspect of this system and without a database, the *Real Estate By Referral Operations Manual* will not function.

## Calendar Program

The next item you need to select is a Calendar Program to keep you organized.

You will be using this program frequently not only for your appointments, but also for prioritizing your daily activities.

The Calendar Program will also keep track of important contact dates for clients including birthdays, scheduled calls, and even important dates within a listing or purchase agreement.

The above mentioned database programs all have good Calendar Programs that come with that system so you may be able to accomplish two tasks with one program. Use a Calendar program that is most comfortable to you.

**It is important to note that it might be easier to use the same Calendar and Database Program because they will correlate with each other.**

## Filing System

Once again, a major theme of the *Real Estate By Referral System* is organization. You will need a filing system if you do not already have one currently.

It is recommended that you buy or find a legal sized filing cabinet for your clients' files along with the client checklists that will be provided to you later and all the necessary documents you need to keep for each client.

Buy one color of filing folders for sellers and a different color for buyers. Make the extra effort and use labels to identify the client and put them in alphabetical order to make it easier when you go to find them.

Have Buyers in the front of the file and Sellers in the back of the file. You will be referring to your files quite often, so setting up this simple system will solve many organizational issues you might have in the future.

## The Buyer Process

The best way to explain the buying process is to utilize the [Buyer Checklist](#) as a reference guide for a detailed explanation.

Each area of importance in the buying process is highlighted on the checklist and each section is explained in detail.

The actual checklist is located on the next page and any of the actual documents that are referenced in the [Buyer Checklist](#) can be found in the [Buyer Addendum](#) section. Each item provided on the [Buyer Checklist](#) is linked to a detailed explanation of that particular item on the list.

This checklist may seem extensive, but remember, you will be completing these activities through the entire buying process to help you stay on top of what needs to occur. It is recommended to not only check off each item on the list, but also include the date the task was completed.

*The Buyer Process* officially begins once you receive a referral or a call from a client who is in the market to purchase a home in the near future.

**Note:** Bolded headings represent each item from the *Buyer Checklist*, and the italicized words are parts of the buyer script or correspondence.

**Example**

**Buyer Checklist**

Client:

*First Appointment*

Set Appointment/Send Note

Create Buyer File Folder

Company:

Agent Office Phone:

Agent Cell Phone:

Mortgage

Buyer Presentation Folder Completed

Thank You Note Sent

Buyer Game Plan/Phase 1 Letter Sent

Mortgage Phone:

Title Company:

*Buyer Transaction Process*

Pre-approval Letter Received/Buyer Search Set-up

Purchase Agreement, Counter Offers, Schedule Important Dates, Make Copies

Phase II letter & Copy of Purchase Agreement Sent

Earnest Money, Copy, Sent

Closing Date \_\_\_\_\_ Home Owner's Insurance \_\_\_\_\_

Purchase agreement, Earnest Money Copy Faxed to Mortgage Person

Financing-Written Application Completed

Home Inspection Scheduled, Response Completed

Pictures Taken at Inspection for Change of Address Announcements

Closing Scheduled

Utilities Letter/package Scheduled 2 Weeks Prior To Closing

Home Owner Association Documents Received & Responded

Financing Approval

Title Work Completed & Received

Insurance Ordered & Paid For

Sellers Disclosure Signed

Closing Costs & Necessary Settlement Costs For Buyer Discussed

Confirm Utilities Changed

HUD 1 Statement Received & Discussed

Closing Completed

*Post Sale*

Pizza Gift Certificate

Send Agent Thank You Note

Client Charity Choice

Phase III Letter & Questionnaire Sent

Call Referrer & Thank You Note Sent

Send Agent Thank You Note

Mortgage and Homestead Exemption Letter Scheduled If Necessary

Address Announcements & Address Labels Sent

HUD Letter Date Scheduled for January

1 Year Home Anniversary Scheduled

Spring/Fall Checklist Letter Scheduled

Change Database Information

1 Week & 2 Month Calls Scheduled

Change Database Information



## First Appointment

### Set Appointment/Send note

When you call to set up the initial appointment use the following dialogue:

*Hello \_\_\_\_\_! This is Gavin Weber calling from (your company) and (referrer) told me to give you a call.*

*How are you doing (brief small talk)? (Referrer) mentioned you are looking to buy a home sometime in the future, and I just wanted to learn a little more about your plans.*

*What are you planning to do? (if they are in fact looking to buy a home soon then simply continue, if they are not in the market refer to below) That sounds great!*

*Well, if you are like most of my clients, you probably have many questions. I have found whether people are first time home buyers or have bought multiple houses, it is very beneficial to take a few minutes to sit down to discuss your plans and goals.*

*I want to hear what your goals are to determine how I can best serve you, and I have some brief information regarding the buying process that people find very helpful.*

*Depending on your questions this meeting usually takes no longer than 45 minutes. How does that sound to you? (Buyer Response) What does your schedule look like?*

Use this script if the potential client answers by saying they are not currently in the market:

*I understand. I appreciate you sharing that with me. One thing I would like to ask is I have what I call a Gratitude Program which is one way I stay in touch with people. It includes a monthly newsletter and some other fun items.*

*I would like to stay in touch with you so would you mind if I included you on my program? (let them respond) Wonderful! I just need your address and I*

*will put you on the list so that when a need arises in the future you will have somebody you can call.*

Proceed to get their address, phone number, and call back to get their [\*important dates\*](#) in the future.

Make sure you have your schedule in front of you when you call and that you have some times that would work during the day or evening. The more deliberate you are regarding the time that works best for you, the better the chance you can make that time work. Be prepared!

After setting up the appointment, send the following handwritten note:

*Dear \_\_\_\_\_,  
I am very much looking forward to meeting you on (date and time of scheduled meeting). Our meeting should take roughly 45 minutes depending on your questions. Thank you very much for the opportunity to meet with you, and I will see you soon!*

*With gratitude,  
Your name*

If they said no and agreed to the Gratitude Program, send the following note:

*Dear \_\_\_\_\_,  
It was my pleasure speaking to you on the phone. I am looking forward to staying in touch through my Gratitude Program that I mentioned to you. Please know that you can call for any reason because I am here to help!*

*With gratitude,  
Your name*

### **Create Buyer File -**

As soon as you set up a prospective buyer appointment, create a buyer file folder because it will be your intention to help this person buy a home and creating the file assumes you will.

Making the folder also helps begin the organization process. The [Buyer Checklist](#) is always at the front of the folder along with any documents that you begin to complete.

Refer to the [Filing System](#) section with help on what kind of file to make for you buyer.

### **Buyer Folder Completed**

Prior to the initial appointment, create what is called [The Home Buying Organizer](#) (click on the link to learn more) that you will be giving to your buyer clients at the initial appointment to help them stay organized throughout the process.

This organizer is explained and provided in much greater detail in a future chapter.

### **Thank You Note Sent**

After the appointment, make sure to follow up with another handwritten note thanking them for the appointment. Here is a good example:

*Dear \_\_\_\_\_,*

*I want to thank you again for meeting with me. It was a pleasure meeting you, and I am very excited about serving you. Please do not ever hesitate to call me with any questions. I will be in touch soon!*

*With gratitude,*

*Your name*

### **Buyer Game Plan/Phase 1 Letter Sent**

From the [Buyer Profile](#) and the [Buyer Questions](#) you will ask at the initial appointment, you will create a [Client Game Plan](#) to make sure everyone is on the same page. Take the information you receive from these two documents and plug it into the [Client Game Plan](#) document.

After you complete the *Client Game Plan*, print a copy and send it with the *Phase 1 Letter* which highlights what is happening at this point in the buying process and what will be taking place up until Phase 2 begins.

Then send your client the *Client Game Plan* and the *Phase 1 letter* immediately after your first appointment. In review...

1. Create *Client Game Plan* based information from *Buyer Questions* and *Buyer Profile*
2. Print *Phase 1 Letter*
3. Send both the *Client Game Plan* and *Phase 1 Letter* immediately after the initial appointment if they have decided to use your services.

## Buyer Transaction Process

### Pre-approval Letter Received/Buyer Search Set Up

- Check this box off when you have a pre-approval letter in your possession.
- Once you have the pre-approval letter, set your clients up on an automatic-buyer-search (depending on your multiple listing service) which sends clients automatic searches based on the criteria they conveyed to you on the *Buyer Profile*.

### Purchase Agreement-Counters Signed, Schedule Important Dates, Make Copies

- Once they make an offer and it is accepted including all counter-offers, make a copy of all these documents because you will be sending a copy to your client.
- Make sure that both parties have signed all documents and insert all of the timeline dates listed in the purchase agreement into your calendar system (closing date, inspection deadlines, insurance commitment date, and any other time- sensitive items).

### Phase II Letter Sent, Copy of Purchase Agreement

- Once the two parties have agreed on terms with all the appropriate signatures, send out the *Phase II Letter* which explains what takes place from the purchase agreement acceptance until the actual closing.
- Also, include a copy of all the purchase agreement documents and any counter offers.
- Put it in your calendar to follow this letter up with a phone call **three** days after you send it to determine if they have any questions.

### **Earnest Money, Copy, Sent**

Make a copy of the earnest money for your records and deliver the earnest money within the time period as stated in the purchase agreement.

### **Closing Date, Homeowners Insurance Ordered**

- Write the date of the closing per the purchase agreement on the provided line so that it can be easily referenced.
- List the deadline date of when the hazard insurance commitment needs to be received (insert both of these dates into your Calendar Program).

### **Purchase Agreement, Earnest Money Copy Faxed to Mortgage Person**

Immediately fax the purchase agreement and a copy of the earnest money to the buyer's mortgage company after you have an acceptance from both parties and appropriate signatures.

### **Financing Written Application Completed**

Simply state the exact date the written application was completed in order to make sure everything is going according to the stated time in the purchase agreement.

### **Home Inspection Scheduled/Response Completed**

- This checklist item is designed to make sure the inspection is scheduled and the client has been notified so just write the scheduled date on the line provided.
- Further, check this line off once the response has been accepted by both sides and completed within the time frame provided in the purchase agreement.

### **Picture Taken at Inspection for Change of Address Announcement**

- It is highly recommend for all of your clients to attend the home inspection. Ask your clients to be there when the inspector is finishing so they can hear and see firsthand what issues need to be addressed.
- In addition, one of the services you can offer your client is a change of address announcement that you will offer to send to whomever they choose.

It basically consists of a postcard that they send to friends and family to notify them they have moved and the new address. It is recommended to take the picture for the postcard at the inspection so the postcards are ready to send immediately after closing.

### **Closing Scheduled**

Once the inspection response is complete, confer with your client and the other real estate agent to determine a closing time that works for all parties.

### **Letter/package Scheduled Regarding Address & Utilities 2 Weeks Prior to Closing**

- Basically, put it in your calendar to send the Utility Letter at least one week prior to the closing date which includes details regarding the utility companies they need to call to put the home into their name as of the date of possession.
- As a very nice touch, you can also provide them a change of address packet from the post office in order to have mail routed to their new home.

### **Home Owner Association Documents Received & Responded**

- Check this item off your list once you have received and delivered the association documents to the clients within the time specified in the purchase agreement.
- Make sure any required responses per the purchase agreement are followed.

### **Financing Approval**

Check this item as completed once you hear from the mortgage company that they have been underwritten and officially approved and ready to close.

### **Title Work Completed & Received**

Make note of the date title work was received.

### **Insurance Ordered & Paid For**

Check this item as completed once the insurance has been ordered and determined if it will be prepaid or paid at closing.

### **Seller's Disclosure Signed**

Make sure that both buyer and seller have signed the seller's disclosure.

### **Confirm Utilities Changed**

Confirm that your client has made the necessary utility information changes.

### **HUD 1 Statement Received and Discussed**

Call the client immediately upon receiving the HUD settlement statement to discuss the accuracy and to disclose how much money they need to bring, if any, to closing.

**Closing Completed**

List the successful closing date for record purposes.

## Post Sale

### Pizza Gift Certificate

- Give your client a pizza gift certificate for \$25 as a closing gift and give them a menu and coupons from the pizza company. They can use it while they are moving (another great option is to provide a nice basket of food or supplies at closing).
- Include a nice handwritten note congratulating them on the completion of their transaction and explain how much you enjoyed working with them. Use the referral tag line to end your note.

### Client Charity Choice

This will be your choice if you want to do this, but it is recommended to let clients know that you will donate 5% of your commission to a charity of their choosing. Ask them which one they prefer after closing.

### Phase III Letter & Questionnaire Sent

- The Phase III Letter explains that your service to them is just beginning, and they will continue to be a part of the Gratitude Program. It continues by thanking the client for allowing you to serve their needs and it also asks for referrals.
- In addition, send the Phase III Letter in a 9 x 12 envelope because you need to include the Agent Feedback Evaluation with a self-addressed envelope to make it easy for your client to respond to the questionnaire and put in the mail.
- The Agent Feedback has a section for referrals, and it is recommended to follow up with a phone call on the questionnaire to see if there is anything they would like to share verbally or if they have any referrals.

## Call Referrer and Thank You Note Sent

It is always crucial to thank the person who provided you the buyer referral. Also, acknowledge the referrer even if a referral was originally an addition to the *Gratitude Program* (buyer was not in the market at the time they were added to the database).

Call the referrer and thank them and update them on what has transpired. Here is the language:

\_\_\_\_\_, (Referrer's Name) *how are you doing? Great, I just wanted to let you know that \_\_\_\_\_ (Referral's Name) ended up buying a house in \_\_\_\_\_, and they are really excited.*

*It was a pleasure serving \_\_\_\_\_ (Referral's Name), and I just want to tell you how much I appreciated your referral. Referrals are what keep my business running, so please let me know if I can ever help you or any of your friends again. Thank you so much!*

Immediately follow up this conversation with a quick handwritten note thanking them again.

## Send Other Agent a Thank You Note

It is very important to build great relationships with other real estate agents. Always send a thank you note upon completion of the transaction. Here is an example:

*Dear \_\_\_\_\_,  
I want to let you know how much I enjoyed working with you to complete this transaction. I appreciate all of your work, and I would welcome the opportunity to work with you again. Hopefully our paths cross again soon.  
Thanks again!*

*With gratitude,  
Your Name*

## **Mortgage & Homestead Exemption Letter Scheduled**

Depending on where you live, your clients will be required to complete some documents regarding exemptions.

As a reminder and courtesy to your clients, schedule in your calendar an appropriate date in the future to send the Exemptions Letter provided in this manual.

## **Address Announcements & Address Labels Sent**

- Take the picture you took for your client at the home inspection and put it in the your change of address postcard document (you will need to make you postcard, *Microsoft Publisher* is the recommended program, refer to the postcard example for ideas)
- Insert the necessary information on the postcard and decide whether or not to either send the postcards or give them to the client at closing.
- Also, consider providing your clients with five sheets of return address labels using the same picture on the labels. *Microsoft Word* is a good program to use to easily make the return address labels. Your clients will love this!

## **HUD Letter Date Scheduled for January**

Frequently, there are fees on the settlement statement that apply to taxes.

As an extra service to your clients, schedule a time in the middle of January to send all of your buyer clients a copy of the HUD Letter which explains they can get a copy of the HUD from you, if needed, for tax purposes.

## **1 Year Home Anniversary Scheduled**

Put their one year home anniversary on the calendar and call them at the one year date. Call and let them know it has been one year since they closed on their home.

Here is how the conversation goes.

*Hello \_\_\_\_\_! How have you been (small talk)? Wonderful to hear things are well. I am calling you because this may come as a surprise, but today is your one year home anniversary!*

*Can you believe it?(let them respond) I just want to make sure you know you can always call me for any reason.*

(Let them respond)

*Also, I am always looking to serve wonderful people like you so please let me know if any of your friends or family are looking to buy or sell their home. Thank you so much for always keeping me in mind! Thanks again, and I will be in touch.*

### **Spring/Fall Checklist Scheduled**

Depending on what area of the country you live, on April 1<sup>st</sup> you will be sending all the people who bought a home from you the Spring Checklist and the Spring Checklist Letter which explains how to get your home ready for the summer months.

On October 1<sup>st</sup>, you will send all your buyer clients the Fall Checklist and the Fall Checklist Letter to help them get ready for the winter months if necessary.

Schedule each of these letters in your calendar. Sometimes it is easiest to just schedule the date in your calendar and send all of you buyer clients the letter and checklist for that time of year.

### **Schedule 1 Week and 2 Month Call**

Schedule a date in your calendar one week and two months from closing to call your client and check on them to see how everything is going. This is also a great time to ask for referrals.

Always end the conversation with the following:

*Also, I am always looking to serve wonderful people like you so please let me know if any of your friends or family are looking to buy or sell their home. Thank you so much for always keeping me in mind! Thanks again, and I will be in touch.*

### **Change Database Information**

This is a reminder to put the client's new address in the database and to double check this list to make sure everything has been followed and to possibly tie up any loose ends.

## Buyer Presentation Appointment

### Description

The buyer presentation includes the script and presentation materials to use on your buyer appointments. You will use the same presentation whether or not the prospective client is a first time or past home buyer.

It may take a little bit more time going into more detail with first time home buyers, but never assume that people remember the process if they already bought a home previously.

The presentation will take place at the first meeting and the goal of this initial appointment is the following:

- Learn more about client's expectations, concerns, and how they prefer to be served
- Walk them through the buying process, what to expect, and your services
- Find out exactly what they are looking for in a home, a timeline, and overall goals

Prior to the initial appointment, make the Home Buyer Organizer binder for them using the following contents:

A ½ inch 3 ringed binder with a clear sleeve on front (\$3.00 at Staples/Office Max)

The Home Buyer Organizer sheet with client's name on it (make this sheet using your logo and put it in the front clear sleeve of the binder)

The Buyer Questions sheet (insert in left inside sleeve of binder)

Buyer Process Sheet (insert in the 3 ringed prongs inside the folder in a clear sleeve)

Conducting Effective Searches (first viewable sheet of right side interior sleeve)

Buyer Profile sheet (second sheet on right side of binder)

A copy of a purchase agreement (bottom of right side of binder)

Any company literature you would like to include (insert in left side sleeve of binder)

This binder is called The Home Buying Organizer and you will give it to your clients at the initial appointment to help them stay organized. There is exact language in the *Buyer Presentation* script section.

## The Presentation

At the beginning of the initial appointment, spend a few minutes getting to know the buyer if they are new to you. Ask them about where they work, their family, any interests they have, and whatever comes naturally.

Always remember that this is about building relationships and rapport. This appointment should be relaxed and the focus will be on them.

It is recommended to have the meeting at your office to avoid distractions and to show your professionalism. The meeting should last no longer than an hour unless the clients have lots of questions.

## The Script

### Build Rapport

*Greg & Cindy, how are you? Good, did you have any trouble finding my office?*

*I'm very excited about meeting with you and working with you to help you find a home, but first I would love to get to know you a little better.*

*What do you do for a living? Are you from this area? Where did you go to school? How do you know (the person who referred them)?*

*Well, just a few things about myself.*

(Have a brief synopsis prepared about your situation regarding things like how long you have been in real estate if you have experience, your family, your interests, what you like about real estate, tidbits about the person who referred them, etc)

*Let's get started. Tonight I have three things in mind. First, I want to ask you some brief questions. This meeting is about you and what you want to accomplish.*

*The more I find out about you, how you liked to be served, and the criteria regarding the home you want to purchase, the better I will be able to serve you.*

*Next, I want to review the buying process so you can know what to expect and feel more comfortable about what it going to take place. Obviously, we don't have three hours to discuss everything, but I will cover the things you need to know about going forward.*

*Thirdly, I will spend some time learning about exactly what kind of home you plan to buy including the details and a timeline that would work best. Does this sound okay?*

*Please feel free to ask any questions at any time and please let me know if there was an issue that you were wondering about that we did not cover.*

*Great, I am just going to ask you some brief questions to learn how I can serve you better.*

The next step in the presentation is to refer to the Buyer Questions Sheet and ask the clients the questions (role play asking your clients these questions and be prepared to ask the questions in a different manner if they don't understand).

There is no right and wrong answer. Whatever they say is important to them and the purpose behind these questions is to learn about things you need to know about them.

How they answer these questions will give you the roadmap to how they like to be served and what issues they are most concerned with

*Okay, thanks for sharing. This will help me serve you in the best possible manner. So now I want to walk you through what will take place from now until closing so you will have a clear picture of the process. This will also help reduce some stress you may be feeling.*

*This is what I call The (your company name) Home Buying Organizer (show them the Home Buyer Organizer). You will probably come across a lot of information and this binder is designed to help keep you organized.*

*In fact, each time we view homes I will provide you with a listing sheet and on the back of the sheet will be a rating system for each house and a place to take notes.*

*We may view a number of homes, and I have found the rating system and notes section to be efficient ways to help people remember a home and what they liked or did not like about it.*

*Just simply include all the information you gather right here in this notebook.*

Open the book and refer to the Home Buying Process sheet.

## **Phase 1**

*I have divided the home buying process into three phases which is just something I devised to make the process simpler.*

*Phase 1 is from now until we find a home and make an offer on it.*

*Phase 2 is from the time we receive an acceptance or come to terms on an agreement until the closing date.*

*Phase 3 is what I call my Gratitude Program which is how I will continue to serve you after the transaction because my service consists of much more than just during the transaction.*

### **By Referral Only -**

*So let's go through Phase 1. I would like to start by sharing how I work and how I run my business. I decided to run my business completely by referral because what I like most about this business is helping people find a home and serving their needs.*

*I also like working with people I know or with friends of people I know rather than people with whom I have no relationship.*

*I also feel working by referral is a win/win situation because my entire business depends on earning trust and respect.*

*It is my intention that I provide such great service that my clients feel compelled to refer me to their friends as if they are actually doing their friends a favor by referring them to me.*

*Basically, the success of my business relies on providing great service. Therefore, I get to spend all of my time serving my clients needs instead of prospecting for new clients.*

*In the referral approach that I use, we both win because I spend my time serving you, and the event you are happy with my services, I would simply ask that you refer me to your friends and family who would benefit from my services.*

*It is very important to note that I realize your trust and respect is earned, and I plan to do that rather than just talk about it.*

### **Pre-Approval Process -**

*The pre-approval process is crucial for the following reasons. Number one, it is no fun looking at homes you can't afford.*

*Secondly, it doesn't make sense viewing homes online or in person if you don't know how much you are approved for, and even more importantly, you need to know how much you feel comfortable paying on a monthly basis.*

*Sometimes people can afford more than they feel comfortable paying.*

*I have a great mortgage person (make sure you do have a relationship with a reliable mortgage person) that I can recommend to you. I work with this person and company because they have competitive rates, great programs, and their service is exceptional which is obviously very important.*

*I also recommend this person because I want to make sure you are properly taken care of during this transaction so financing is not a worry for you. Would you like their name?*

(Having your clients use your recommended mortgage person is great, but not absolutely necessary, it will make sure you know they are in good hands, and help you build a relationship)

*I want to make it clear there are many mortgage people out there that you can choose, yet I think you would really enjoy meeting with (the name of the mortgage person - give them the information if they are interested).*

*Once I receive what is called a pre-approval letter from your mortgage company, then we can officially begin the process of viewing homes in person and online. Do you have any questions about what I have shared?*

**Estimated Expenses** - These expenses may vary by market so be prepared to insert your own conservative numbers.

*Regarding the estimated expenses, I always like to give people an idea of potential upcoming expenses.*

*When you meet with the mortgage person, they will also provide you with a good faith estimate regarding what you can expect to pay in closing costs, and depending on how much you choose to put down on your new home, they will give you a total amount of how much you can expect to bring to closing.*

*You will also need to meet with the mortgage person to see how much your closing costs will be which will include the mortgage expenses and pre-paids like insurance and taxes (go into this in more detail if you deem necessary).*

*There are options that can allow you to bring less to closing depending on the mortgage program you choose, but I will let your mortgage company explain that further so I don't confuse you.*

*Here is what else you can expect to pay. Insurance companies require you to pay your insurance one year in advance and in the price range you mentioned, that will be in the \$ \_\_\_ ball park depending on which insurance company you choose.*

*Also, I will highly encourage you to perform a home inspection which I will describe in more detail. This is usually between \$ \_\_\_ and \$ \_\_\_ depending on the size of the home.*

*So after meeting with the mortgage person, you will have a very good idea on what to expect for future expenses.*

### **Devising a Game Plan**

*The next part of Phase 1 is devising a game plan. In a couple of minutes, I am going to be asking you some very specific questions about what you like in a home and how you would like to see this unfold.*

*I will take all the information you provide me today and devise a game plan based on what you shared.*

*I have found this game plan makes sure we are on the same page and allows me to serve you in the best possible manner. I will compile this information and send it to you in order to get your approval that we are on the same page regarding your home buying goals.*

### **Conducting Effective Searches**

Pull out the actual Conducting Effective Searches document from the binder and refer to it.

*Buying a home is obviously a very big purchase, and therefore, we want to make sure we find the right home for your needs. I have a specific way that I have found works best toward finding a home that meets your needs.*

*First, once I have the criteria you are looking for in a home, I will be putting you on an automatic search that will send you all the homes currently on the market.*

*Then you will receive new emails when new homes matching your criteria come on the market.*

*This automatic search does the online work for you, but I still suggest you perform your own searches to make sure nothing falls through the cracks.*

*Viewing homes on the internet is a great way to get a feel for the market without having to view 50 homes in person. On the other hand, the pictures don't always portray the home correctly.*

*I highly recommend driving by homes that interest you prior to us going to view it.*

*Sometimes homes will back up to railroad tracks or will be located on a busy street. Pre-viewing homes can eliminate homes that would not interest you so when we set up homes to see, we will be going to view only homes that interest you. Does that make sense?*

*If you don't always have time to preview, then that is okay, but I recommend driving by homes and viewing neighborhoods to get a feel for that particular area.*

*Once you feel comfortable with some homes you would like to view, just let me know which homes, and we will work out a time that is convenient for both of us. I recommend viewing no more than six homes on one day because anything over that can be counter-productive because it can be hard to remember them.*

*I will bring a copy of the listing, and on the back I will have a rating system that will help you recall the properties we view.*

*As we view the homes, we will be paying close attention to what condition the homes is in, possible improvements to increase value, the neighborhood, whether or not the home meets your needs, and basically if you like it or not.*

*We will have a lot of fun! Do you have any questions about this process?*

## **Making an Offer/Counter Offers**

*Once we find a home that meets your criteria, we will make an offer on that home. I have provided a copy of the purchase agreement that I recommend reading through so you will be familiar with it when we make an offer.*

*We will review it together at that time and complete it after I perform a comparative market analysis. Then we will discuss a game plan regarding what terms we intend to attain.*

*Once the purchase agreement is completed, I will send the purchase agreement to the sellers (fax or in person depending on your market) and they will either accept it or counter offer back which means they will reply with their terms.*

*We then have the choice of countering or accepting and so on. Once it is accepted by both parties, we will then move into Phase 2 of the home buying process. Does this all make sense?*

## **Phase 2**

### **Purchase Agreement Acceptance**

*When both parties agree and sign the purchase agreement and any possible counter offers, then we will have an acceptance.*

*I will need to have original signatures on all the documents, and we will go over the Seller's Disclosure which is a document where the seller states what works or what is defective in their home so we have a better feel for the overall condition of the home.*

*We will have the Seller's Disclosure document prior to making an offer so we can be made aware of any possible problems.*

### **Earnest Money/Inspection Response**

*Depending on the amount that we agreed upon in the purchase agreement, I will deliver the earnest money, and the listing agent will cash it and put in an escrow account.*

*I will get a copy of the check from you while we are going through the purchase agreement, and I will provide a copy of the earnest money check with the offer to exemplify we have a serious offer on the table.*

*Therefore, the earnest money will already be in my possession. Keep in mind this amount will be credited at closing back to you.*

*I will also contact you to schedule a convenient time to perform the inspection. I have some companies that I can recommend at that time, but if you know someone, then that is fine too.*

*Inspections are crucial because you want to make sure you are not buying a defective home that will incur thousands of dollars in repairs.*

*After the inspection, we will ask the buyer to repair the items that need attention, and they will give us their response by either accepting or countering.*

*We can then counter or accept depending on how we feel (cover the language in your purchase agreement about defects and earnest money). Once both parties accept the inspection response conditions, we will be on our way to closing.*

### **Finalizing Financing**

*After the inspection response is complete, you will just need to make sure you get anything the mortgage company requests to them in a timely manner. Sometimes the underwriter will request different things depending on the program and situation which is common.*

### **Utility Info/Moving Packet**

*Approximately one week prior to closing, I will be sending you a list of your future utility companies including their contact information.*

*A few days prior to closing, you will want to change the utilities into your name on of the date of possession as agreed in the purchase agreement. We*

*will also send you a moving packet with helpful tips and a change of address kit from the Post Office.*

### **Settlement Statement/Closing**

*The last step in Phase 2 involves the closing. At least one day prior to the closing, we will receive the HUD 1 statement which is the settlement statement or a breakdown of the financial information.*

*It will tell you how much money to bring to closing, if any. We will review it prior to closing to make sure it is correct.*

*The closing is simple. There will be a lot of documents which will be explained to you that you will sign in order to own the house. And voila, you will be the proud new owner of your home!*

### **Phase 3**

**Change of Address Postcard** - show them an example if you intend to provide this service.

*Phase 3 is my post sale program of which I call my Gratitude Program. My service to you will be just beginning once we close on your house because I intend to continue providing you great service.*

*My Gratitude Program is just one way I intend to do that. For example, if you so choose, I like to take pictures of people on their front porch and make Change of Address Announcements. (Show them an example of a postcard if you choose to do this for clients)*

*As you can see, it has your new contact information on it to notify friends and family of your recent move. Your friends and family will love it.*

*If you give me the addresses, then I will send them for you or just tell me how many postcards you need, and I will get them to you.*

## **Housewarming Party**

*I also like to throw my buyer clients a house warming party. I will take care of the invitations, food, and planning.*

*You would just have to tell me what kind of party you would like and of course invite me, but don't worry I don't go around working the room telling them I am your wonderful real estate agent (ha ha).*

*We can discuss this at that time, but I just wanted to make you aware of this possibility.*

## **Exemption Reminder**

*In certain situations you will probably qualify for some tax exemptions that will save you money (explain any potential exemptions in your state).*

*Most title companies will not file these for you, so we will send you a reminder to file which will include directions and what you need to bring. It is very simple, yet very important that you remember to file for these in order to save money.*

## **Seasonal Checklist**

*In the early Spring and Fall, we will be sending you a checklist that provides you with some helpful information regarding how to get your home ready for the upcoming season.*

*The seasonal checklist is a very handy and cost saving document that will really help you.*

## **Post Sale/Gratitude Program**

*I will be doing a variety of other things too, but I don't want to spoil the surprise. My business is built completely through referrals by providing*

*exceptional service, and my Gratitude Program is just one method I use to make sure I exceed your expectations.*

*Do you have any questions about Phase 3?*

## **Buyer Profile**

*Now let's take a few minutes to fill out the Buyer Profile. I have broken the profile down into two sections WANTS and NEEDS.*

*WANTS are things you would love to have but are not absolutely necessary like crown molding, a fence, large kitchen, etc.*

*NEEDS are a MUST- meaning if the house does not have it, then you don't want to even view or consider it.*

*For example, the needs are what I will use to create the online search like the minimum number of bedrooms, bathrooms, square footage. So let's get started.*

Proceed to get the minimum number of each listed criteria and answer the questions. Then proceed to the list of wants. Then discuss the ideal time frame and set the goal for when they would like to close.

Make sure you know their rental or housing situation to plan accordingly.

## **Closing**

*We have covered a great deal of information today - is there anything else that I have not answered or that you are wondering about? (Answer any questions)*

*Great, we will be reviewing all these important details as we proceed, so don't be overwhelmed.*

*I am here to walk you through this process and make it fun and less stressful. I want you to look back at closing and say it was easier than you thought it*

*would be. I am very excited to be a part of this experience with you and please don't hesitate to call me for anything.*

*Let's review again what you are doing from here.*

*Meet with the mortgage person here soon so we can get the pre-approval letter and get started. Once I receive that, I will start the online search and send you our game plan. I will also touch base with you here soon.*

*Thanks again for coming to my office and have a great day!*

## The Listing Process

### Description

The *Seller Checklist* is much like the *Buyer Checklist* in that it is the system to help keep you organized throughout the selling process and help you give the same great service to all your selling clients.

The next page contains a copy of the *Seller Checklist*, and each section of the checklist is explained in detail. Every time you have even a potential client, assume you will do business with this person by making a file for the potential client.

Put the *Seller Checklist* in the front of the folder you create for this client.

Fill in the client's name in the upper right hand corner of the sheet, and you are now ready to begin serving this client.

Always assume you will do business with any referral that you receive and plan "as if"

This checklist may not include everything you prefer to do for you clients. Therefore, feel free to include any extra tasks you perform and want to track for your clients.

**Note:** Bolded headings in the following section represent an item from the *Seller Checklist*. The italicized words include contact from the seller's script.

## Seller Checklist

Client:  
Agent Phone:  
Agent Cell:

### *Pre-listing*

- Create Seller Folder
- Listing Introduction Appointment/Pre-listing Questions Answered
- Confirmation Note Sent

### *Listing Items*

- Listing Introduction Appointment
- Scheduled Listing Paperwork Appointment \_\_\_\_\_
- Buckle Your Seatbelts Letter* Sent w/ Include *Preparation Checklist*
- Schedule Monday Contact in Calendar
- Listing Paperwork Appointment
- Listing Basket Delivered/Sign In Yard/Lockbox
- Listing Agreement and All Disclosures Signed, Make Copies
- We Have Lift Off Letter* Sent/Copy of Listing Agreement/Seller Gameplan
- Listing on MLS
- Flyers Ready To Go
- Feedback Activity Log
- Signed Purchase Agreement/Counter Offers/Acceptance/Disclosures
- Disclosure Signed By Buyer
- Change Status to Active Accepting Backups
- Runway Is In Sight Letter* Sent/Copy of All Documents Included
- Home Owner Association Documents Delivered
- Send Purchase Agreement to Title Company/Title Work Ordered
- Earnest Money Received & Deposited
- Home Inspection Completed/Home Inspection Response Accepted
- Change Status to Pending
- Closing Scheduled for \_\_\_\_\_, Title Company Location
- Inspection Items Completed
- Closing Congratulations Note/Gift Certificate

### *Post Sale*

- Thank You For Flying Letter Sent
- Send Other Agent A Thank You Note
- Call & Thank You Note To Referrer
- Schedule 1 Week Follow Up Call
- Change Database Address Information

## Pre-listing

### Create Folder

Create a folder for your file with your client's name on it, and put the *Seller Checklist* in the front of the file so at any time you can find any necessary details regarding the transaction and stay organized.

### Listing Intro Appointment Scheduled/Pre-listing Questions answered

Once you receive a call from a client or from a referral, schedule a time to perform the listing appointment. After setting up the time to meet, make sure to ask them the Pre-listing Questions so that you will be better prepared for the appointment.

Here is the language to use:

If it is someone you know who wants to list their home use the following phone script:

*Hello \_\_\_ (future client) this is \_\_\_\_\_ (your name) calling back. How have you been? That is great to hear! I understand you are considering putting your home on the market. So what are your plans? (Allow response)*

*I would love to hear more about your goals and what you are looking to accomplish.*

*With your permission I would like to set up a time to meet so I can go through my Listing Presentation regarding how I effectively sell homes quickly and for top dollar without a lot of stress.*

*Further, I will view your house and provide you with a recommended listing price based on a Comparative Market Analysis of your home which will also depend on the condition of your home.*

*I will also answer all of your questions, so you will know what to expect. How does that sound?*

(Have your calendar handy and recommend some times that would work for you, after setting the appointment ask the Pre-listing Questions).

If it is a referral:

*Hello \_\_\_\_\_ (future client) this is \_\_\_\_\_ (your name) calling from \_\_\_\_\_ (Your Company Name). How are you today? That is good to hear. \_\_\_\_\_ (referrer name) told me to give you a call because they mentioned you may be putting your home on the market, is that correct?*

(If they say no, then just try to figure out where they are at in the home selling process and ask to include them on the Gratitude Program; if they say yes, continue)

*You obviously do not know me, but some brief information about myself, I work 100% by referral which means I spend all my time serving my clients instead of always prospecting for new clients.*

*Therefore, my service needs to be exceptional because my business depends on very happy clients so that I earn their referrals.*

*My whole business philosophy and system involves treating people the way I would like to be treated. With your permission I would like to set up a time to meet so I can go through my Listing Presentation regarding how I effectively sell homes quickly and for top dollar.*

*Further, I will view your home and provide you with a recommended listing price based on a Comparative Market Analysis of your home which will also depend on the condition of your home.*

*How does that sound?*

(Have your calendar handy and recommend some times that would work for you).

*In order to better prepare myself for the appointment, I have a couple of questions that I need to ask you. (Ask the Pre-listing Questions).*

*I just want to let you know how much I am looking forward to meeting you and potentially helping you sell your home. I will see you on (date and time). Thanks again!*

**Confirmation Note Sent**

Immediately after setting up the listing, write the following handwritten note:

*Dear \_\_\_\_\_,*

*I am very much looking forward to meeting with you and learning more about your situation. I intend to serve you in the best possible manner, so please don't hesitate to ask me any questions when we meet. I will see you at (time and date) and thanks again!*

*With gratitude,*

*Your name*

## Listing Items

### Listing Introduction Appointment

The Listing Introduction Appointment is when you view your client's home, ask them the *Listing Questions*, give them the *Listing Presentation*, review the comparative market analysis, and schedule the listing date.

Notice you do not sign the listing that day unless they have already made their decision.

- Whenever you conduct the entire *Listing Presentation* it is a two appointment process. If you have a great presentation and build good rapport, then your clients will really respect this approach and it will actually help you get listings from not being too pushy.
- Make sure to get commitment for the listing and determine the exact date they plan to list, but it is too much time for one appointment and also they will have multiple tasks to perform prior to listing the home.
- Many agents may not like this approach, but if you have a good relationship with your client, it is a very good way to do business. If they want to list that night, then by all means do so. This is explained in detail in the *Listing Presentation*.

### Scheduled Listing Paperwork Appointment

Make note of the scheduled date that you will return and fill out the listing agreement along with reviewing the items provided to them in the *Preparation Checklist* and any other pertinent details.

### "Buckle Your Seat Belt" Letter Sent/With Seller's Preparation Checklist

The *Buckle Your Seat Belt Letter* is sent after the Introduction Listing Appointment and includes a copy of the *Preparation Checklist* that you will compile based on the items that need attention.

The seller letters are a fun way to describe what will be taking place during the selling process using an airplane flight as a metaphor.

### **Schedule Monday Contact in Calendar**

- As mentioned, in the *Listing Presentation*, you will be contacting your listing clients every Monday either by phone or email.
- If there is something important to discuss or update, then give them a call.
- If you are just touching base with them to see if they have any questions, then you can either call or send them an email.

Communication is crucial to obtaining a client's satisfaction with you their real estate agent. Stay in touch a minimum of a weekly basis to alleviate any potential frustration and to provide them with great service.

### **Listing Paperwork Appointment**

On this appointment you will complete the listing agreement, any disclosures, review the *Preparation Checklist*, and discuss what will transpire going forward (exact details as explained in the *Listing Presentation*).

### **Listing Basket Delivered/Sign in Yard/Lockbox**

Deliver a nice gift basket with a good, yet not too strong smelling candle, some possible goodies, and any other creative items.

Keep this very simple and inexpensive. Also, put the sign in the yard and the lockbox on the door at this time (do all of this on the day the listing date is active).

### **Listing Agreement Signed, Disclosure's Signed, Make Copy**

1. Review all the paperwork and make sure everything is signed properly and all the information in the documents has been thoroughly reviewed for errors.
2. Make a copy of each of these documents.
3. Check this box off your list once you have completed these tasks.

### **"We Have Lift Off" Letter Sent, Copy of Listing, Seller Gameplan**

1. Send the *We Have Lift Off Letter* immediately after the listing agreement has been signed and the listing is active.
2. Make sure to include the *Seller Game Plan* document and a copy of the listing agreement with the *We Have Lift Off Letter* mailing.
3. The *Seller Game Plan* document is self-explanatory, but will you need to fill in the blanks regarding the pertinent dates and information on the document. Make any changes or additions that you deem necessary.

### **Listing on MLS**

Put the date the listing was included on the MLS on the line provided for easy reference.

### **Flyers Ready to Go**

Make flyer packages for potential buyers to take at showings and describe how you would like these packages displayed for showings. Provide flyers for the outside if you choose to provide outside flyers (if you use flyers make sure you use color copies).

### **Feedback Activity Log**

The *Feedback Activity Log* is a document where you keep track of all the showings including who showed it, when, and what their feedback was.

You always email this document after receiving feedback on a showing, and it will be a running log with the most recent showing at the top.

### **Signed Purchase Agreement/Counters/Acceptance/Disclosures**

Make sure all these documents are signed with original signatures.

### **Disclosure Signed By Buyer**

Make sure the seller's disclosure is signed by all relevant parties.

### **Change Status to Active Accepting Backups**

If your MLS has a way to show people there is an accepted offer on the home, but the seller's are still accepting backups, then make this status change. Otherwise just change the status to pending.

The idea behind changing it to "Active Accepting Backups" is that in case the inspection does not go as planned, the home has not missed valuable time off the market.

### **Runway Letter Sent/Copy of All Documents Included**

Send the *Runway Letter* after the purchase agreement has been accepted. Simply include a copy of all the above listed documents for their records.

### **HOA Documents Delivered**

List the exact day any necessary documents have been sent according to the purchase agreement time period.

### **Send Purchase Agreement to Title Company/Title Work Ordered**

Fax a copy of the purchase agreement to the title company to begin the title search process. Double check with the title company to make sure the title work has been ordered.

### **Earnest Money Received and Deposited**

Deposit the earnest money in the appropriate escrow account by the designated time frame within the purchase agreement.

### **Home Inspection Completed/Inspection Response Accepted**

Check these items off once they have been completed. Pay close attention to time lines.

### **Change Status to Pending**

Once the home inspection and inspection responses have been completed, then change the status to pending on the MLS if you have not already done so.

### **Closing Scheduled/Title Company Location**

List the exact date and time for the closing that has been scheduled and the location of the title company (include a map to the title company, [www.mapquest.com](http://www.mapquest.com) is great).

### **Inspection Items**

Check with clients to make sure items have been or will be repaired by the agreed upon date including documentation or proof of any kind.

### **Review HUD/Utility Information**

Review the settlement statement for accuracy. Offer to email your clients the utility information to make sure your their name has been removed from the utility companies based on the date of possession.

### **Closing Congratulation Note/Gift Certificate**

Have the below note ready at closing and include a reasonable gift certificate to a restaurant you think they would like (feel free to use a different and creative closing gift). In the note say:

*Dear \_\_\_\_\_, (Client Name)*

*We did it - Congratulations! It has been my pleasure serving you, and I hope you know you can always call me for any reason because my service to you is just beginning.*

*I will be in touch soon to see how you are doing. Enjoy a night out on me as a token of my appreciation. Thank you so much for the opportunity to serve you!*

*With gratitude,  
Your Name*

*Your referrals are the life-line of my business. Thank you!*

## Post Sale

### "Thank You for Flying" Letter Sent

Send the *Thank You for Flying Letter* immediately after the closing. Send this letter in a 9 x 12 sized envelope and include a self-addressed return envelope with postage already on the envelope.

### Send Other Agent a Thank You a Handwritten Note

Send a thank you note expressing your thanks for their help in closing the transaction. Building relationships with other agents is often overlooked, but a key component of serving your clients and being a professional real estate agent.

Dear \_\_\_\_\_, (Buyer's Agent)

*I want to let you know how much I enjoyed working with you to complete this transaction. I appreciate all of your work, and I would welcome the opportunity to work with you again. Hopefully our paths cross again soon. Thanks again!*

*With gratitude,  
Your name*

### Call and Thank You Note to Referrer

Use the script listed below to call the person who referred you:

\_\_\_\_\_, (Referrer) *how are you doing? Great, I just wanted to let you know that I just ended up helping \_\_\_\_\_ (Client) sell their home. It was a pleasure serving them, and I just want to tell you how much I appreciated your referral.*

*Referrals like this are what helps me spend all my time serving people, so please let me know if I can ever help you or any of your friends again. Thank you so much!*

Then follow this call up with a quick handwritten note thanking them again for thinking of you and trusting you with the referral. Make sure to end your note with - *Your referrals are the life-line of my business. Thank you!*

### **Schedule One Week Follow Up Call**

Place the date in your calendar to follow up with your client one week after the closing to see how they are doing, ask and use the referral language.

### **Change Database Address Information**

Make the necessary address changes in your database. If the seller is moving out of state consider removing them from the database.

## The Listing Presentation

### Description

The Listing Presentation begins the moment you walk into someone's home for the listing presentation until you walk out the door. All the materials you need will be explained in detail.

The presentation is not long and purposely to the point because it covers everything that is necessary. There is not a lot of fluff which will help keep your clients interested.

The listing presentation has been tested and tweaked in order to get the best results.

Always remember if you are intentional about serving and helping your clients, then the client will understand that and feel more comfortable.

The potential clients will be people you either know or that have been referred. Treat them how you would want to be treated.

Be professional which means always wear appropriate attire, yet keep the overall atmosphere light and comfortable. You will want to get commitment on the appointment for them to do business with you without pressuring them.

Your relationship with them will play an important role including the endorsement from the person who possibly referred you.

There is extensive language provided for the entire presentation. You do not have to necessarily memorize word for word the entire script, but it is recommended to stay as near as possible to the intent and script that is provided.

The script serves as a guide and starting point to explain the Listing Presentation.

**Note:** Bolded headings are pages of the actual Listing Presentation and italicized words represent the actual listing presentation script.

### **Listing Presentation Folder**

- Recommended leather (or very nice) three ring binder
- Corporate Mission Statement (first page)
- Biggest Concern page (second page)
- How I Run My Business page (third page)
- Menu of Services (fourth page)
- What Makes A Home Sell (fifth page)
- Basic Real Estate Theory (sixth page)
- My Goal page (seventh page)
- Comparative Market Analysis (back insert)

## Listing Presentation Script

The following pages include the language used for the Listing Appointment. Make sure you are properly prepared by following these suggestions:

- Prior to the appointment, make sure you have cleared your mind and are ready to fully engage with the client.
- Leave any stress or problems behind, be very intentional regarding how you want to be, and visualize how you would like the meeting to go.
- Once you enter the home, put your folder down on the table where you will be meeting and ask for a tour even if you have seen the house before.
- Get a good feel for what improvements need to be made and the condition of the home so you can discuss some of these items in your presentation.
- As you are touring the home, point out things you really like that are attractive and keep a positive tone about their home regardless of any glaring issues.
- Ask your clients if there are any items that need to be repaired or need attention as you are getting the tour.

Having followed these suggestions you will be prepared to share the *Listing Presentation*.

All italicized words are the actual script and information inside parentheses will give you further direction and suggestions. The script begins from the moment you greet your clients:

*Hi, \_\_\_\_\_ (Client's Name) how are you (possibly nice to meet you)? Where will we be meeting this evening? Is it all right if we sit at your kitchen table?*

*Great, I would like to get a good feel for your home, would you mind giving me a quick tour?*

(As you proceed just make positive comments regarding what you like)

- *You have a beautiful home.*
- *I really like and is very nice!*

*Is there anything that I am not noticing or can't see that may need attention?*

(After you have received the tour and discuss some of the promising features and learned more about any problems, then go back to the table and begin the presentation)

*Thank you so much for the tour. You have a beautiful home and with a little bit of work we will sell this home! Let's sit down and get started.*

*I want to let you know that I always serve my clients in a manner that I would like to be served so I am very deliberate about what we cover.*

*I have some brief questions I want to ask to hear more about your goals and how you like to be served which will allow me to provide the best service possible.*

*Then I am going to briefly cover some very important items regarding selling your home, and I will explain my Menu of Services which provides details about how I market your home and my overall home selling philosophy.*

*I will then share with you a Comparative Market Analysis based on homes in this area that are similar to your home, and I will give you my recommendation regarding the listing price based on the information I provide you and the current market conditions.*

*As we go through this, feel free to ask any questions, and at the end of the appointment we will see how you are doing and if you have any further questions.*

*I am here to serve you, so is there anything else you wanted me to address this evening?*

(Tend to whatever they share - wait to address items that will be covered in the presentation)

(You will now begin asking them the *Seller Questions* and going through each of the pages in the *Listing Presentation*, each bolded item is a link to that particular document)

**Seller Questions** - click to view these questions.

*Okay, let's get started. As I mentioned, I have a few quick questions for you.*

(Go through the questions with your clients. It is recommended to role play asking these questions prior to your appointment so you can determine exactly what their concerns are, how they like to be served, and other important things to take into consideration)

(Write down what they say and pay close attention asking follow up questions where necessary)

*Thank you very much! This information is very important to know so that I learn how to best serve your needs.*

### **Mission Statement**

Feel free to use the page provided or create your own mission statement.

*I have a brief presentation that I would like to begin which includes some information about my company, some relevant real estate information, and my Menu of Services which includes how I intend to market your home.*

*The first page is my mission statement and my declared values.*

*Can you take a second to read this because it is very important for me to have you know what my business is all about? (Give them time to read your mission statement and declared values) Thank you!*

### **Biggest Concern**

Ask your clients the following question: *What are you most concerned about regarding this transaction?*

*Tell me more about why that concerns you. What else? How can I help make that less of a concern? Great, thank you so much.*

*I will be discussing these items in my presentation, but I want you to rest assure that we will address these issues, and I will serve you in a manner that handles all of these concerns.*

### **How I Run My Business**

*I'm not sure how much you know about the real estate business, but many real estate agents use a different approach to run their business. You probably receive a lot of stuff in the mail like postcards or other items that many agents are marketing to complete strangers.*

*Most agents spend a lot of time and money on complete strangers searching for new clients.*

*I realized early in my career that what I love most about this business is helping people reach their goals and serving them in the best possible manner.*

*Therefore, I decided to spend all of my time and money on my clients, and my business has grown ever since I chose to run my business by referral.*

*As soon as I decided to run my business completely by referral, I was able to spend my time helping my clients with their needs rather than always searching for the next client.*

*In return, my clients really appreciated my service to them, and I began to receive more and more referrals.*

*I create a win/win situation for both of us.*

*My clients win because they receive great service due to the fact I spend my time serving them which then holds me accountable because my growth and success relies on clients who refer me.*

*Also, I win because I get to spend my time helping people rather than prospecting. It is a lot of fun, and I really enjoy my job.*

*I am always looking to serve people, so please don't hesitate to call me if you know anyone who has a need for my services now or in the future.*

(Then proceed to briefly read what is on the page and make sure they understand the significance)

### **Menu of Services**

*I am now going to go through my Menu of Services which is my system for selling your home. I want to let you know I have tried and test many strategies to sell homes and what I am going to share below is what has worked best.*

*There is a great deal of fluff that I choose not to go through regarding obvious services that I will provide like putting a sign in your yard, a lockbox on the door, etc.*

*I am going to explain each point here and explain what it is and why it works.*

*My Menu of Services is a deliberate, proven system that gets result. It involves paying attention to details and the science behind selling a house that is often overlooked.*

*I believe this system covers the most important aspects of selling a home, and it is very effective in getting results.*

(The next section is the explanation of the *Menu of Services*. If there are items you would like to include that are not listed, then do so. Just make sure they serve the client's goal and are important to selling homes)

(Avoid fluff because this can confuse people and take away from what is really important. Feel free to add some information about your company)

(Also, review the menu to see if you need to make changes based on philosophy. This system works so please consider using all the recommended services in the presentation)

### **Maximum Exposure, MLS, All Major Websites**

*One of the most important aspects about selling your home is obviously exposure. We need to make your home accessible everywhere people are looking.*

*It used to be that people would look through magazines, and sometimes they still do, but everyone that I have worked with or talk to looks on the internet where they can easily view many homes in a short period of time.*

*Therefore, it is crucial that we make sure we have your home listed online everywhere people are looking.*

*Here is how I accomplish that. First, as stated before, your home will go on the local Multiple Listing Service. Many buyers look here first, but not everyone knows about it, so I don't stop there.*

*When it is listed on the MLS it is automatically listed on Realtor.com which is the largest national home listing website.*

*It also is listed on all the major real estate companies like Re/Max, Century 21 and so on*

(Make sure what is said here is true for your MLS, make any necessary language changes).

*When people look for homes, they will find your listing in their respective searches.*

### **Realtor.com Enhanced Website**

Read this language to determine if you are willing to do this, I highly recommend signing up for this enhanced service if you have not already.

*I don't stop there. Many people will be viewing homes from out of town and therefore using sites like realtor.com and yahoo.com to look at homes.*

*I pay an extra fee to realtor.com in order to provide my listings with more exposure.*

*My listings on realtor.com are highlighted, have scrolling text, more pictures, and other valuable tools that make my listings more noticeable which increases potential interest.*

*Realtor.com also then forwards this listing out to over 70 other major websites where some people may be looking for homes.*

*The bottom line is wherever people are viewing homes online, I am very confident they will see your home if it matches the criteria they submit.*

### **Devising a Game Plan**

*It is very important that I help you achieve your real estate goals and that we are on the same page. I have a system that will allow me to serve you in the best possible way and help us stay on the same page.*

*In the event you would choose to use my services, I will launch this system which will begin with a game plan.*

*I will mail this game plan to you based on what you have shared with me to make sure we are on the same page regarding our goals.*

*The game plan is also rather extensive. In a competitive market I have found the littlest detail can make all the difference.*

*My personal listing game plan includes taking the best pictures, preparing the house so it looks the best it ever has, staging it so it looks comfortable and bigger, and including language in the listing that makes people want to see your home in person.*

*When people try to sell their home online they overwhelm potential buyers with information rather than centering on the emotional components regarding why people buy homes.*

*The goal is to get people to view your home in person.*

*Then based on price and the condition of your home, we put ourselves in a position that increases the chances that they choose your home over other homes.*

*There is a science to selling your home, and I have a proven formula that works.*

## **Communication**

*The number one reason sellers are dissatisfied with their real estate agent is because they never hear from them. The agent lists the house and then they rarely hear from them.*

*That is obviously a major problem. It is my belief that we are working together to sell your home and communication is crucial.*

*Therefore, I have devised a system to stay in touch. I will be contacting you via phone or email every Monday until we sell your home to provide updates and see if you have any questions.*

*Basically, I will just touch base with you.*

*You are always welcome to call me at anytime, and I will most likely be in touch with you on other days too regarding the feedback we receive from showings.*

*Do you have any questions?*

## **25 Day Feedback Questionnaire**

*Many people in a service industry wait to receive feedback on how things are going until after the transaction is complete. I don't like to wait because I want to be proactive and work together to achieve our goal.*

*Therefore, I will be sending you a feedback questionnaire to complete and send back to me after your home has been listed for 25 days.*

*Hopefully your home will sell by then, but 25 days is enough time to have a discussion regarding how you feel things are progressing.*

*Your feedback is appreciated and welcome.*

*I always want to know your thoughts and how I can best serve you.*

## **Open House Philosophy**

If you like and plan to do open houses, then remove this section from the menu. I have used this exact language regarding open houses for years and no one has ever had a problem.

Most people are relieved or just don't care because they understand that open houses rarely sell homes.

*Simply put, I do not do open houses and let me explain why.*

*Have you ever been to an open house?*

*The first thing that usually happens is the agent on call says hello and asks some questions.*

*One of those questions is almost always "Are you working with an agent?"*

*The reason they ask you that question is the exact reason why they are having the open house. Realtors have open houses to find new clients! If they happen to sell the house in the process, then that is a great bonus, but not the overall purpose.*

*Back when I use to sit in people's homes on Sunday afternoons and perform open houses, I found something interesting.*

*In the rare case it was not a neighbor or some stranger just being nosy, the people who had an interest almost always already had a real estate agent.*

*What this means is that they would return with their agent. They would see the house with the agent they were already using.*

*For those few people who had some real interest and didn't have an agent, those people could have just as easily called the sign and scheduled their own private showing.*

*Here is the thing; I am always ready to show your home to people at any time who have interest. I have found if people have interest and do not happen to have a real estate agent, then they will call the number on the sign and set something up.*

*If they do have an agent, then they will always call them to set up a showing if they have interest.*

*Since I work by referral, I have no desire to have you leave your house for three hours so I can meet your neighbors.*

*I firmly believe that open houses just do not serve to help us achieve our goal of selling your home.*

*What are your thoughts? (Handle any objections and comments)*

### **Direct Phone Line Sign Advertisement**

For those agents who own their own company or have the ability to advertise their direct phone number on their sign.

*Have you ever heard of floor time? Well, floor time is where agents at some offices sign up to take incoming calls regarding the office listings.*

*The reason they agree to do this is to find buyers who are not working with an agent to try to get them as a client.*

*The problem with this is that these agents on floor time rarely have an interest in helping sell your home which is what prompted the call in the first place.*

*Their primary goal is to obtain the caller as a client rather than sell your home.*

*On the other hand, the number on my sign comes straight into my office and is handled by myself (or a staff member) who is interested in selling your home and not getting some stranger as a client.*

*Therefore, when they call, not only am I familiar with the property to answer their questions, but I am also able to share exciting things about your home and prompt them to view it in person.*

*Basically, I have the control of incoming calls which only increases our chances of selling your home and not someone else's home.*

*Does that make sense why that is so important?*

### **Feedback Activity Log**

*Receiving feedback from showings is often overlooked, but I believe it is crucial. If people do not put an offer on your house, then I want to know why because I want to determine if it is something we can control.*

*If it has to do with location or a nearby busy street, then there is not much we can do.*

*On the other hand, if they say there was a funny smell or that they didn't like the decorating, then those are items we can improve.*

*If it becomes a common theme with feedback, we will take appropriate action. I also want to know their thoughts on price. Price is always a huge part of the equation.*

*I will also provide you a feedback document every time we receive feedback from a showing which will include a running log of all the past feedback including the showing agent, the date, and what was shared.*

### **Aggressive Negotiation Skills**

*The importance of negotiation is often overlooked as a major component to not only getting deals done, but also to getting the best price.*

*I know how to play the negotiation game, and I like playing it. This is a learned skill, and I enjoy negotiating.*

*I can be very aggressive depending on what you would like to accomplish.*

*Ultimately, the decisions regarding how we negotiate any potential offers will be yours to make. I will provide you with options from which to consider.*

*Then I will explain what can possibly happen in each situation depending on how aggressive you want to be.*

### **Proactive Selling (Agent Networking)**

*I have an extensive network of agents with whom I network, and we help one another sell our listings. Agent networking can be very beneficial because agents like to do business with agents they know and like which leads me into my next point.*

## Agent Relationship Building

*When clients wonder about the significance of going with a certain company, I always ask if they personally paid attention to what company listed the home they bought.*

*The answer is always "no" because they only pay attention to whether or not they like the home.*

*Well, I can tell you the agent always pays attention to WHO the listing agent is... meaning if they know the person or not.*

*If they don't know them, then no big deal, but if the agent has been difficult in the past, then it can play a role in the recommendations.*

*Many sellers have no idea this happens.*

*I am not necessarily saying that agents actually deter their clients from purchasing a home because of the listing agent, but I am saying it can play a factor in the buyer agent's excitement toward a home.*

*This is one reason I work very hard to have impeccable relationships within the real estate community.*

*I always send a handwritten note to agents after I have completed a transaction to let them know how much I enjoyed working with them.*

*Further, I also write a note whenever a listing is scheduled that states I would very much enjoy working with them, and I ask them to contact me with any questions.*

*To this day I have never had another agent do this to me. Believe me, if or when they do I will be impressed and would welcome the opportunity to work with this agent.*

*Attention to small details like this can make all the difference in a competitive market.*

## **Flyers/Showing Packets**

(Have an example flyer to show them, use *Microsoft Publisher* to create a flyer if you do not already have a format)

*Regarding flyers, I have some clients who absolutely love flyers out front so people driving by can grab one and I have other clients who just don't care about flyers.*

*I lean toward having flyers outside the house attached to my for sale sign. If we decide to have flyers, then they need to be in color.*

*My color flyers usually include a couple of interior pictures that whet the appetite along with some bullet points that highlight the home's features. The goal with any flyer is to make people want to view the home and set an appointment.*

*I also have the seller's disclosure and the flyer available inside so people can take one during the showing to help them remember this house and see that it has no major issues on the disclosure.*

## **Preparation Checklist - How to get top dollar!**

*Price and preparation are the two biggest controllable factors of selling your home. We will discuss price in just a few minutes, but I can not put enough emphasis on the importance of preparation.*

*Your home not only needs to be clean as a whistle, but it also has to be organized.*

*Once we decide on a listing date, I will provide you with a checklist of items you would need to complete to get your house ready.*

*If you are ready to list soon and decide to use my services, then I can create that list today.*

*Otherwise we will just create that checklist prior to the listing agreement being signed. This is so important that we will not list your home until all the items have been completed.*

*Preparation will not only get you more money, but it can also be the difference between selling your home and not selling your home.*

### **Staging Recommendations**

*Staging your home for showings is also one of the most crucial aspects of this entire process. We want your home to look as spacious as possible and for people to feel comfortable.*

*That means some furniture may need to be removed and any possible clutter be removed or replaced.*

*When we list your house, I want you to be impressed with how it looks. I intend to have people say "wow" when they enter your home.*

### **Showings**

Explain how the showings work depending on if your office schedules them or if you outsource this service. Convey any perceived advantages to your way of scheduling showings.

### **5% Charity of Your Choice**

"Charity Choice" is optional, but highly recommended. Clients love this extra detail, and you will be exemplifying your values. It also makes quite an impression on your clients.

*I also take 5% of my portion of the commission and donate it to a charity of your choice.*

*If you end up not having a charity that you select, then I send the 5% to \_\_\_\_\_ (Name of your charity of choice, this will be a tax write off for you the agent).*

*I am a big supporter of helping other people, and this is just one way I am able to do that.*

*Do you have a charity that you would like to choose?*

### **Post Sale/Gratitude Program**

*Lastly, my service to you will only be beginning once we close on your home. I am here to serve you for a long time in a multitude of ways, and that is what I intend to do.*

*My Gratitude Program is one way that I stay in touch with people which includes a monthly newsletter, a yearly Gratitude Party, and lot of other stuff that I will leave as a surprise.*

*I am also always available to answer questions and provide you with referrals to any services you may need.*

*Do you have any questions regarding my Menu of Services? Okay, let's continue.*

### **What Makes A Homes Sell?**

(Just spend a minute on this page as a quick education, bolded items represent actual language on the What Makes A Home Sell presentation page)

*I want to spend just a couple of minutes talking about what makes a home sell. **Besides location, what crucial components make a house sell?***

*The answer is **price and preparation** which is what I covered earlier. These two things are crucial and can mean the difference between selling your home and not selling your home.*

Let me ask you, "**Why did you buy this home?**" (Let them respond)  
**Buying is based on emotion - buyers see something they like in a home and buy it or they see something they don't like and eliminate it.**

*It is imperative we don't give a buyer an excuse not to buy your home.*

*Therefore, preparation comes into play. The preparation process includes **having your home clean and organized properly so the buyer will feel comfortable.***

**Secondly, any defects must be repaired to get maximum dollar.**

*The other crucial aspect is again price. I have many clients who have a rational of just listing their home for a price over market value just to see what they can get and hopefully snag a buyer.*

*Early in my career I use to buy into this logic, but I soon realized that was to the detriment of my clients.*

*My job is to be authentic with you and provide you with what you need to hear. I always say that I may not always tell you what you WANT to hear, but I will always tell you what you NEED to hear.*

*What I mean by this is that I won't just pacify clients to get a listing, only to insist on price reductions later.*

*I feel this is a terrible disservice, and I am always operating with my client's best interest in mind.*

*I want to get you the most money, and the best way to ALWAYS do that is to list your home for the right price in the first place. Here's why:*

**Over-priced homes are often not even considered because if your home is overpriced then it will not compare to other homes that are priced correctly so people won't even choose to view your home.**

*Further, when houses are on the market too long, buyers assume that there is a problem or defect.*

*They assume this because they notice other people have passed on the home, and therefore, instead of coming up with reasons they like it, they start looking for why other people have passed on it, and usually they are able to find the same excuses not to buy it.*

*In the end, incorrectly priced homes usually end up costing sellers more money by having to pay extra mortgage payments and having less leverage for negotiating due to how long it is on the market.*

*Does this make sense?*

*Any questions on why price and preparation are so important?*

### **Basic Real Estate Theory**

The *Basic Real Estate Theory* presentation page is self-explanatory. It is just going through how the real estate market works.

Simply role play this page a number of times to make sure you feel comfortable explaining how interest rates, supply and demand, and location play a role in the market.

Read the information on the page to the clients and answer any questions. This page should not take more than a minute or two to cover.

Below is language for the final two points that are very important to reiterate.

(Say the following after you have read the CMA bullet points listed in the presentation)

*I will be reviewing the comparative market analysis that I have created for you in just a second. I want to reiterate the importance of price. I plan to work with you to come up with a price that will help us achieve your selling goals.*

*Again, an over-priced home will cause frustration and will serve no beneficial purpose. In order to get top dollar, the most crucial time in marketing your home will be the first 45 days!*

### **My Goal**

Just simply read this page.

*My goal is to sell your home fast so that you get top dollar and that my service alleviates the hassle, and I intend to serve you in a manner that greatly exceeds your expectations. How does that sound? Before we get into the CMA, do you have any questions for me?*

### **Comparative Market Analysis**

Many real estate agents Comparative Market Analysis are very fancy and full of fluff.

Although I think any information you provide your clients needs to be professional, the seller is most concerned with seeing the homes on the list and hearing your recommendation.

Almost every Multiple Listing Service system has some sort of Comparative Market Analysis creator so it is recommended to use that system.

Conduct a search based on the neighborhood or local proximity, same number of bedrooms, bathrooms, and very near the square footage, garage, basement, etc. As a real estate agent, you should know this routine.

Make the CMA as basic as possible so it is easy to understand when your clients look at it without you there.

Have a breakdown of the active, pending, and sold homes from the past six months unless you need more data and go back one year taking that into consideration.

Have a cover page (make any changes you want to the cover page to enhance it), have the CMA next, and then include a copy of each listing that is included in the CMA with the color picture so they can identify the home.

Just walk them through the numbers explaining any abbreviations and the breakdown.

You are the expert and will need to be prepared with what the numbers are saying regarding what price you believe is your best recommendation. Use the following language to make your recommendation.

*So here is the information I use to determine an appropriate and beneficial listing price based on the current market and numbers that you see here. As you can see, the average days on the market is \_\_\_ (go into detail about the significance of the number and how it affects the price).*

Spend a few minutes explaining the market time, the averages, any details that other homes may or may not have that need to be considered, and the appreciation in your area.

*Based on the numbers I see here and my professional opinion to sell your home quickly and for top dollar, I would recommend listing your home for somewhere between \_\_\_\_\_ and \_\_\_\_\_ depending on how aggressive you want to be.*

*We are working together here, and I am open to your input. I have provided you with this range because sometimes people say to me I just want to sell my house, so I want to be more aggressive.*

*This lower number is being more aggressive.*

(Give them these two numbers to let them play a role in the decision process. The top number is the amount you actually recommend and the bottom number is a number that would be more aggressive and might be slightly under market value. The recommended percentage range for these two numbers is 3%)

(Let them comment and see what they think and handle any objections by referring to the numbers in the CMA. If they object to your numbers, then ask their opinion and why their home would sell for more based on the numbers)

(Stay strong to your recommendation unless they convey something valid that you did not consider. If they agree, then you move on)

If not, then say the following:

### **Not in Agreement Objection Language**

*Mr. and Mrs. \_\_\_\_\_ (Client's Name), I completely understand how you feel. I want to make it clear that I am on your side.*

*Obviously, I want to get you the most amount of money because I know that it will make you happier which is obviously good for both of us.*

*On the other had, if I allow you to overprice your home, then I am doing you a huge disservice.*

*Early in my career, I would let my client's disappointment over-ride my professional judgment regarding properly pricing their homes to sell based on what the market dictated. The end result when I would used their hopeful selling price was that they received les money.*

*Another thing to consider is that sometimes homes that are over priced don't even sell. I strongly believe this amount is what it will take to sell your home quickly for the most amount of money.*

*Do you see where I am coming from based on what I just shared and the numbers I have presented to you?*

*Great, let's work together to get this number figured out.*

(Then go through their payoff and potential expenses. Be very honest constantly reminding them that you are here to help them get the most amount of money but most importantly to help the actually sell their home. The commission questions will be approaching quickly)

*As for my commission rate, I charge \_\_\_\_% of the listing fee. I will offer a buyer agent \_\_\_\_% of that portion if they bring a buyer to the table.*

(If they seem fine with your fee and you get approval from them, then simply proceed to the presentation closing; go into the following language if there appears to be any resistance.

*My commission fee is based on all the services I have just discussed with you. I believe the value behind what my services provide makes the amount well worth it. In fact, I believe that my services will help you net more money from this transaction and have much less stress.*

*Do you have any specific questions concerning my fee that I can address?*

If they feel it is high, be ready to reiterate what separates you from other agents, working by referral, your service, your experience, your systems, etc.

### **Presentation Closing**

*Great, now that we are in agreement the last thing to discuss is a date to list your home. Remember I will need to perform another walk-through on your home to identify the preparation checklist items.*

*What looks like a reasonable day we should plan for?*

Offer any relevant insight regarding time of year, month, or week to list the home. Possibly recommend to your clients to avoid the end of the week as to not miss exposure and possible showings for a weekend.

At this point any objections should have been exposed and resolved so it should be a matter of just setting up the planned listing date and preparation items.

*That sounds good. I will perform the walk-through \_\_\_\_\_ (either now or designated time) and once those preparation items are completed, then we can schedule the listing date to complete the listing agreement, put a sign in the yard, the lock box on the door, and begin the marketing system.*

*I just want you to know I am thrilled to have the opportunity to serve you, and I am really looking forward to making this process go smoothly. Thanks again and have a great day!*

It is understood some agents will disagree with the approach of waiting and doing work prior to signing the listing.

Gavin Weber never lost one listing using this method because of the people he chose to serve, and the trust he had in them. They appreciated the service and respect and in return they awarded him the listing as they had already agreed to do.

After the appointment remember to follow the items on the [Seller Checklist](#).

## Gratitude Program

### Overview

The idea behind this entire system is to serve people in such a way that you earn their trust and respect. Building a relationship with people is not an exact science, yet it begins with authenticity and caring for people's needs.

If you take care of your clients, then the business you intend to build will take care of itself. *The Gratitude Program* includes the activities you will use to build relationships.

Character and sincerity are the cornerstones of building relationships, and when you perform the activities listed below, it will be crucial that your intentions are sincere.

*The Gratitude Program* is designed to allow you to stay in touch with past, current, and future clients in such a manner that you exceed their expectations.

You will be articulating that you also serve clients before and after each transaction rather than just during a transaction.

There is language in the *How I Work* section of the *Buyer Presentation* explaining how you will serve them and why it is beneficial for both of you. *The Gratitude Program* is what makes this whole system work so well and what makes it so much fun.

The activities listed in *The Gratitude Program* are how you will be spending your time building your business and serving people.

No more open houses and no more floor time.

Spending time helping and serving people is a very effective use of your time and will help you earn many referrals.

*The Gratitude Program* will also be what separates you from all of the other real estate agents.

Many real estate agents spend a great deal of time, energy, and money on complete strangers while you will be spending less money and much more time staying in touch and serving the people you already know.

This program is based on a different motivation/mentality that what is being taught by many Brokers, yet it will bring you the best results for your time and money. Once people know you care about them and their needs, the real estate business becomes easier and more fun.

You will face fewer objections regarding commission fees, and your clients will be eager to refer you so their friends can receive the same exceptional service.

Each aspect of *The Gratitude Program* is explained below including scripts where necessary. *The Gratitude Program* is the heart and soul of this system and the sooner you get acquainted and start implementing it, the better your business will be for it.

### **The New Business Approach Letter**

*The New Business Approach Letter* is what you will be sending to all of your clients once you have completed your new database.

This letter explains that you will be serving clients in a new manner and that you have decided to run your business entirely by referral.

It explains why you have decided to change your service and highlights some of the things you will be doing to serve your clients.

It is basically an announcement that they can expect changes, and it conveys that you will be serving them on a continual basis before, during, and after any transactions.

The first phone call you will be making to them after you send this letter will be obtaining their birthdays and anniversary.

## Newsletter

The newsletter is designed to stay in touch with people once per month and keep your name in the forefront of their mind. It is recommended to use a newsletter called *Service For Life!* that does all of the work for you. All you have to do is insert some of your information into a word document they send you and print it out.

It is highly recommended to send a hard copy newsletter because most people read mail that is sent to them and many emails are never opened or read.

As stated in the *Getting Started* section, the *Service For Life!* newsletter (click on the link to learn more about this product) allows you to add and remove things if there are announcements or additional items you would like to share.

Always include a cover letter that has a catchy headline and share what is in the latest newsletter. Use the cover letter to convey any important information and always ask for referrals.

The *Service For Life!* newsletter is also great because it has many non-related real estate articles that your clients will love and find entertaining.

It is a service that you will be offering everyone in your database as a means to serve people before and after they have used your services.

You can also highlight upcoming events, announce people who have bought homes, celebrate birthdays, thank people who refer you, and utilize it for a multitude of other creative ideas.

The newsletter is your continuous touch and connection with your clients. Send the newsletter out sometime between the 10<sup>th</sup> and 15<sup>th</sup> of every month.

Once you begin sending the newsletter, it is absolutely imperative that you send it every month so people expect it.

Many clients will tell their friends about it, and it will also serve as a great discussion topic when you call them regarding all the different articles that are included.

## Stop Overs

*The Gratitude Program* includes many creative and fun activities that your clients will absolutely love. *Stop Overs* are one such activity, and they are an opportunity to show your clients how much they mean to your business.

It is called a *Stop Over* because you will be delivering an inexpensive gift to your clients at their work or at their home in order to express your gratitude. *Stop Overs* are also a great way of staying in touch with people and for receiving referrals.

Click on the link to view a [\*List of Stop Over Ideas\*](#). It is recommended to design your program at the beginning of the year so it takes the guess work out of what you will be doing each month.

Here's how it works. Depending on the number of people in your database, it is recommended to perform a minimum of 20 *Stop Overs* per month (this is a great use of your time...build trust, wow clients, and receive referrals).

As to not be overwhelmed, deliver 5 *Stop Overs* every week. Each week just decide who will receive the *Stop Over*, and plan your appointments when you will be in that area or schedule 2 hours and devise a route on one particular day to deliver the five (or more) *Stop Overs*.

It is best to perform the *Stop Over* in the afternoon to offices or in the evening if you plan to stop by their home. The *Stop Over* is just that, a brief stop to see a client or potential client and let them know you were thinking about them.

The actual *Stop Over* goes like this:

*Hello \_\_\_\_\_! How are you? (Brief small talk about how they are doing) I can't stay, but I just wanted to stop by and drop off this small gift (explain*

what the gift is). *I also want to make sure you know how much I value you as a (client) or a (friend).*

Then there will be some brief talking. Make sure you do not stay long. After a few minutes or when appropriate, end with the following:

*As you may know, I am running my real estate business completely by referral now. I am always looking to serve more people like you, so please let me know if you have any friends or family who could benefit from my services.*

(Let them respond with anything)

*Thank you so much, and I appreciate you keeping me in mind. I am here to serve you and any friends so just give me a call if you have someone who needs my help.*

*Thanks again and have a great day! Bye!*

(Always follow up any client interaction with a personal hand written note and not an email because it will make a better impression)

Dear \_\_\_\_\_,

*It was so good seeing you the other day. (Briefly mention something you discussed). Please know that I am here to serve you or any friends in any manner so just give me a call. Thanks again for your support, and I will be in touch!*

*With Gratitude,*

*(Your name)*

*Your referrals are the life-line of my business. Thank you!*

Click [\*\*here\*\*](#) for *Stop Over* ideas.

**Note: It is obviously very important to follow RESPA guidelines concerning gifts. It is recommended to study the RESPA guidelines to make sure you fall within their guidelines while performing *Stop Overs*.**

## Personal Notes

The personal note is a **classy** touch that is a major component of this entire system. It is very easy to send an email, yet an email is very impersonal and does not provide the "**wow**" factor needed to **exceed** your clients' expectations.

Few people actually write personal notes which are what makes them so valuable in making an **impression** on people. A personal note must always be **hand-written** and needs to be sent within one day of any interaction with a client or friend.

The actual note can either have a professional business appearance or it can have a motivational or appropriate message on the front.

It must convey that you care about them and exemplify your professionalism. I have included language for many notes in different circumstances throughout this manual.

Any time you see or call a client (unless currently involved in a transaction with the client) is an ideal situation to follow up with a personal note.

Examples of when to write notes include running into people, hearing something that has happened in their life, receiving a call from them, receiving a referral, and basically any kind of contact with them.

People will be impressed, and they will remember you. Always include your business card and sign off with the following:

*With Gratitude,  
(Your Name)*

*Your referrals are the life-line of my business. Thank you!*

In order to get in the habit of writing personal notes, set a goal each week to write a minimum of 20 notes per week. You will begin to notice how many opportunities arise that are perfect for a great personal note.

Begin each note conveying that you enjoyed your recent interaction (whatever that was), reference something specific that you spoke about, and always end with a comment that involves you offering to help them in any way.

Numerous ways to write notes are provided throughout this manual.

The more you write personal notes, the better you will become. As you become more disciplined writing notes, you will see how it significantly impacts your business. Begin today!

### **Phone Calls**

Making *Phone Calls* coincides with writing personal notes. Each is a way to stay in touch with people and show that you care. Calling people and checking in with them is a great way to show how much they mean to you, and it is also a great way to ask for and receive referrals.

The primary reason for the call is to check on your clients and catch up with what is going on with their lives. The secondary reason is to receive referrals.

You will be amazed that when you begin staying in touch with people, you will receive referrals from them.

When you call people, the following will start to happen...people will say things like "just the other day my neighbor was talking about moving" or "I have a friend who might be buying next year" or "actually we have some questions about moving."

You may wonder why they didn't call you, but it has to do with their busy life and maybe just not taking the time.

Making phone calls once again not only shows you care about them, but it is also pro-active. It is an activity that is fun and that gets results by not waiting for your phone to ring.

Making phone calls will dramatically increase your opportunity to receive referrals and determine ways you can serve your clients.

Always be on the lookout for ways you can help people. Whether it is a referral to a carpet cleaner, landscaper, or accountant, there are many ways you can help people outside of any transaction with them.

Phone calls need to become a regular routine because it is one of the activities you will be performing consistently to serve your clients and build your business. Designate a specific time each day that you will be making calls (refer to *The Perfect Day*).

Make a minimum of 4 phone calls per day. The point of the call is to touch base with people and to just have a conversation. It need not be regarding anything real estate related, but if you have served them in the past, it is always good to bring up how their house is doing.

Here are two possible calls:

**People you have not helped buy or sell a home** - no longer than five minutes.

*Hello \_\_\_\_\_! This is \_\_\_\_\_ (Your name) from \_\_\_\_\_ (Your company name). How are you doing? (Small talk, ask specific questions about family, events, see what is going on in their life, etc).*

*I was just calling because I like staying in touch with people to see if I can ever be of assistance. Have you been receiving my newsletter? (Let them respond)*

*Great, well my newsletter is just one way that I serve people and stay in touch. Please know that if you ever need help in any way, just call. I know a lot of great service companies, so if you ever need a referral to anything, then just give me a call. (Let them respond)*

*It has been great speaking with you and before I let you go, I am always looking to serve and help more people like yourself, so just give me a call if I can help them or if they need the services of a good real estate agent. (Let them respond).*

*Thank you so much and don't forget to give me a call if I can help you too.  
Have a great day!*

**For past clients or people you know very well** - take no longer than five minutes.

\_\_\_\_\_, *Hi, this is \_\_\_\_\_ (Your name) calling, how are you? So how has life been treating you? (Ask specific questions about their interests, family, house, etc). It is great to hear that things are going well and thanks for catching me up.*

*Things are wonderful on my end too. (Spend a minute updating them on new things in your life)*

*I don't want to keep you long because I was just checking in on you. I want to make sure you know you can call me for any reason because I am always here to help.*

*Also, I am always looking for more people like you to serve, so please let me know if you come across someone who could utilize my services. (Let them respond)*

*Thank you so much for thinking of me and just call me if you know of anyone. Perfect, I will let you get back to what you were doing. Thanks again and have a great day!*

## **Important Dates**

Special dates like birthdays and anniversary are another perfect opportunity to recognize your clients.

Whenever you meet someone for the first time, it is important to collect their immediate family's birthdays, anniversary, and any other possible important dates.

Go to the store and buy a supply of birthday cards that are appropriate for men, women, and children. Send them a card for their birthday or

anniversary and make sure it gets there at least one day prior to the actual date so it is never late.

You will also be making a phone call on that day to wish them a "Happy Birthday" or "Happy Anniversary".

People absolutely love this gesture, and if they are not home, just leave them a message. Make sure to make calls even for children regardless of their age.

Also, don't mention anything business related because this call is purely about their special day. If one of these dates falls on the weekend, then call them on Friday. Make the calls very brief and to the point.

Click [here](#) for examples of what to possibly include in your various cards.

Here is the possible language you can use when calling:

#### Adult Birthday

*Hi \_\_\_\_\_, this is \_\_\_\_\_ (Your name) calling. I just wanted to wish you a very Happy Birthday. Hopefully you received the card we sent. I hope you have a fantastic day, and Happy Birthday again.*

#### Child Birthday

*Hi \_\_\_\_\_, this is \_\_\_\_\_ (Your name) calling. I am calling to wish \_\_\_\_\_ (Child's name) Happy Birthday! I'm sure it will be an exciting day. Please let \_\_\_\_\_ (Child's name) know that I called and wish him/her a Happy Birthday for me! Talk to you soon.*

#### Anniversary

*Hi \_\_\_\_\_, this is \_\_\_\_\_ (Your name) calling. I called to wish you a Happy Anniversary. This is obviously a very special day, and I hope you have a wonderful day! Talk to you soon.*

## Annual Gratitude Party

Every year it is a great idea to throw a *Gratitude Party* to express your appreciation for all the support and referrals you received from your clients.

It is a great way to get all your clients together so they can see what your business is all about and see your commitment to them. September or October are ideal times to throw this party because it is later in the year and it is prior to the holiday season.

Each year you can have the *Gratitude Party* somewhere different or start creating a tradition at the same venue.

Pick a month at the beginning of the year, and then you should start telling people in person and in your newsletter about it.

Two months prior to the party, advertise all the specifics in your newsletter or in a separate letter to all of your clients including the time, date, and location. Explain why you are having a party.

One example of a party venue is to have it at an outside, trendy bar with some appetizer food and some drinks. A great time to schedule your party is for 6:30-8:30, so people can come after work and drop in at their convenience.

If you choose to have a weekend party, then plan for it to be the event for people that evening and plan accordingly.

The party is a social event that you will be paying for all of the expenses. The party can fit any price range, but if you are on a budget, it is possible to do a party for 50 people for near \$500 if you are creative with your venue.

The idea is to have your clients enjoy themselves and have the opportunity in person to tell them how much you appreciate them. Follow the recommendations below to throw an amazing party that will not only impress your clients, but also provide you with many referrals.

Having an annual Gratitude Party can be the best time and money investments you make in your business. People absolutely love them!

Design the party with a theme and style that fits your budget. Choose to have it catered or do it yourself either choosing to serve dinner or just appetizers and drinks.

One month prior to the scheduled date, send a postcard invitation to all your clients. You could also decide to only invite your best clients to keep numbers down.

Include the time, date, location, directions, and voicemail number for RSVPs.

Two weeks prior to the party, call everyone who has not RSVP'd and ask them if they are attending.

Three days prior to the party call everyone who said yes and make sure they have directions and just remind them about it.

Use the RSVP number to notify your venue regarding the number of people who plan to attend.

Arrive early to set up any necessary items so everything is in order

At the party, let people mingle and make sure you personally say hello to everyone.

Halfway through the party, make a speech that expresses why you are having a party, express your appreciation for them coming, and explain how much they mean to your business.

You can also recognize people who have recently given you referrals with a small gift or select one top referring person. This recognition shows people that you are receiving referrals and it rewards people for their help.

Write personal notes to everyone in attendance thanking them for coming.

The three days following the party, call and thank everyone who attended the party and ask for referrals using the *Referral Language*.

After calling the people who attended, call the people who said they were coming but did not attend and kindly let them know they were missed and again use the *Referral Language*.

Having an audience to speak to many of your clients at one time and the follow up process after the party is one of the major benefits of having a party. You will be in touch with your clients and at the top of their minds.

Very few real estate agents throw a party for their clients which makes it a huge differentiator and "wow" factor.

These are just a few suggestions for a throwing great *Gratitude Party*. You can also throw this at your house and save tons of money. There are many possibilities only limited by your creativity.

The more time and effort you put into this party, the better your results will be.

Having one party a year will be much, much more effective than conducting many open houses. People will love it and they will want to tell their friends. Happy partying!

### **Housewarming Parties**

Another great service to provide your buyer clients is a *Housewarming Party*. The *Housewarming Party* is something you will completely organize and conduct on behalf of your buying clients. The only catch is that they have to invite you to the party, and thus you get to meet all of their friends and start building additional relationships with their friends.

The *Housewarming Party* can be big or small or whatever you both decide. They are usually theme related, like a "stock the bar" party, garden party, or some variety of the clients choosing. Most of your parties may end up being just general parties that involve a cookout of some sort or you can possibly simply use a caterer for a small group of 10-15 people.

Immediately after the closing, follow up with the client to determine if they would like a party. Not all of your clients will take you up on this offer, yet it is a great feature to offer and people will love the idea regardless.

Discuss with your clients how many people they would like to have, whether or not they would like theme, whether they want people to bring housewarming gifts, and what kind of dinner/appetizers they would like to have. Upon deciding what the party will look like, follow the next steps:

- Get a guest list from your clients
- Design a postcard invitation that includes time, place, directions, and theme including whether dinner will be served. If your client is open to receiving presents, then do not mention anything, but if they are against gifts, then kindly mention "no gifts please" on the invitation.
- Send the postcards out two weeks prior to the party making sure you include your voicemail for RSVP's and specific directions to the party.
- Call everyone on the list that does not RSVP one week prior to the party.
- Notify your client of numbers two days prior to party.
- Purchase or organize all food, decorations, and drinks (Note: It is not recommended to buy alcohol for liability reasons).
- Arrive early to help set up all of necessary items.
- At the party, DO NOT go out of your way to let people know you are the real estate agent who is throwing the party - let it happen naturally.
- If appropriate, raise a toast of some kind congratulating them on their new home.

- Follow up with everyone on the list with a note thanking them for coming or stating you missed them if they could not attend. Convey you would love to throw them the same kind of party in the future (Be sure to get permission from you client to send note to the guests).

This party will more than pay for itself because you will probably receive more than one referral not to mention new people to add to your *Gratitude Program*.

Find opportunities to add people to your database so you can serve them in the future. The *Housewarming Party* is once again a great opportunity to "wow" your clients and provide them exceptional, unparalleled service; however it is not a must that you do this for this system to work.

It is highly recommended to at least host this party for your best clients at a minimum. Enjoy!

### **Spring/Fall Checklist & Letter**

The *Spring / Checklist* and *Spring Letter* is another nice little extra that your clients will definitely appreciate.

- At the end of March each year, send all of your past buying clients out the *Spring Letter* and the checklist. This checklist describes what people need to do to get their home ready for the summer months.
- The *Fall Checklist* and *Fall Letter* is sent out in late September to tell people what needs to be done for the upcoming winter months. First time home buyers and seasoned home owners all love this checklist because there are many items they never considered or ever knew needed their attention.

You will see that the letter asks for referrals, and this also is a great reason to call your clients to see if they have any questions about the checklist.

## **Adding New People to the Gratitude Program**

Most people concentrate only on receiving referrals for people who are looking to buy or sell now.

That is a major mistake because everyone is a potential client.

This system takes competition out of the equation because you will be serving people prior to them having a need for your services, so when the day they do need a real estate agent comes, they will think of you.

A true referral is either someone who needs your services now or someone who has been recommended that you should build a relationship. Your chances of working with this person will greatly increase once they are in this system.

Therefore, it is important to always let your clients know you are looking to help people now, but in addition, you would like introductions to quality people who may need our services in the future.

Many real estate agents overlook the future client market and miss out on tons of business.

The other advantage to this strategy is many people never tell anyone they are in the market to buy a home, but due to the fact they are on your Gratitude Program there is a very good likelihood that they will call you to talk with you about their upcoming needs.

Had they not been in your database you would have missed out on this opportunity. You want people calling you when they think of real estate and when they have a need.

This system significantly increases the chances of that happening.

There is a science to this like everything else in *The Real Estate By Referral System*. Use the following scripts:

## Building Your Database: Growing Your Business

Anytime you discuss your career with someone who is not already in your database that you would like to build a relationship with, then use the following language:

*I also want to mention that I have what I call a Gratitude Program that I offer to all of my clients. I run my business completely by referral, and therefore, providing exceptional service is crucial to the success of my business.*

*My Gratitude Program allows me to serve people before, during, and after any transaction and with your permission I can add you to my list. It basically consists of a monthly newsletter and some creative things I do throughout the year.*

*Would you mind if I included you on my list? (If yes, then get their full name, home address, phone number)*

*Great, please don't ever hesitate to call me if I can be of help to you or any friends. Thank you very much!*

Focus on adding as many quality people to your database as possible.

Always follow this call with a personal hand written note, but prior to writing a note, call them and get every person's name in their household including their birthdays and their anniversary date. Explain that this is also part of the *Gratitude Program*.

Here is the language for the follow up call.

*\_\_\_\_\_, hi this is \_\_\_\_\_ (Your name) who you met the other day. How are you? Great, I don't want to take much of your time, but I wanted to follow up on our discussion. I mentioned my Gratitude Program the other day, and you are now on my list.*

*I am calling because I also like to recognize birthdays and anniversaries. Could I get you and your family member's birthdays?*

*What is your anniversary date? Perfect, I'm impressed you knew all of these dates! Thank you for your time and again don't ever hesitate to call me if I can be of assistance.*

Immediately write a personal note:

*Dear \_\_\_\_\_,*

*I wanted to convey it was a pleasure meeting you. Also, thanks for allowing me to add you to my Gratitude Program. I am always here to serve you so don't hesitate to give me a call. Thanks again!*

*With Gratitude,  
(your name)*

The other scenario you will be encountering is when someone refers you someone to be added to the *Gratitude Program* that does not have a need right now but is someone you should get to know.

The approach with these people is to send them the *New Addition to the Database Introduction Letter* and insert the correct information including the person's name that referred you to them.

The letter asks permission to include them on the *Gratitude Program* and explains briefly what the program is all about.

The idea behind the *New Addition to the Database Introduction Letter* is to begin serving people just like you do your other clients and begin building a relationship so when a need arises, they will call you.

Allow them to receive the first newsletter, and then make a note in your calendar to call them and use the following language:

**New Addition Letter Follow Up Call:**

\_\_\_\_\_, *this is \_\_\_\_\_ (Your name) from \_\_\_\_\_ (Your company name) calling. How are you doing today? That is good to hear. I wanted to give you a quick call and introduce myself briefly.*

*I recently sent you my newsletter after speaking to \_\_\_\_\_ (referrer) about you. I just wanted to make sure you received it and that you enjoyed reading my newsletter? (Handle their response, it would be rare to have someone say take me off the list)*

*Perfect, I just want you to know I am here to help you in any way, so please do not hesitate to take advantage of my services. I would love to meet you personally in the future so maybe we can have lunch or coffee down the road. (Wait for response)*

*Thanks for your time, and I will be in touch!*

(This conversation is intended to be a brief introduction call to make sure they want to be included in the *Gratitude Program* and whether or not you wish to continue including them on it)

Follow that phone call with this personal note:

*Dear \_\_\_\_\_,  
I wanted to send a brief note to say how much I enjoyed speaking with you recently. I hope you enjoy receiving my newsletter. As I already mentioned, I am here to help you in any manner, so please feel free to call me regarding any matter. Thank you and I will be in touch!*

*With Gratitude,  
(Your name)*

## **Sorting Clients**

Are all people created equal? Yes, but not all clients are created equal!

One of the main reasons real estate agents have hardship or fail altogether is they do not know how to spend their time and do not identify who most deserves their time.

Once you begin spending the time on the clients who deserve your time, your business will start seeing vast improvements.

There are all kinds of clients, but the most important attribute is the quality of their character. It does not matter how much money someone has because if they are not nice people, they will have a negative impact on your business.

**Do not ever, ever, ever work with a "jerk"**. Do not just ignore these people believing you can help them or change them. Once you realize someone is not a match with who you are looking to serve just simply remove them from your list and move on.

"Jerks" will always take the most amount of time, be the least appreciative, and rarely if ever refer you.

If they refer you, then in all likelihood it will be to another "jerk" which is exactly what you want to avoid.

On the other hand, when you work with people who care about you and who are sincerely nice people, they can genuinely help grow your business. They are very much worth your time.

Focus on quality people and you will receive quality referrals.

This concept is very simple to explain but I can not fully express the importance of serving nice people. Serving nice people will allow you to enjoy your job rather than staying up and worrying about some "jerk" that has a problem with everything you do.

So how do you determine who gets your time and how much time do they get? Simple, you sort your clients into the following five categories.

### *Five Star Clients*

These are your best and most valuable clients. They refer you all of the time and really believe in your business. You want to create as many five star clients as possible (once you begin following this system you should intend to have between 2 - 10% of you database to be *Five Star Clients*).

### Four Star Clients

These clients are crucial to your business. They believe what you do and have referred you or you believe they will definitely refer you in the future. Also, anyone who has done business with you is automatically a four star client.

### *Three Star Clients*

These clients are people with whom you intend to build a relationship in order to move them up to a four star client. They might refer you but have not done so yet.

Three star clients may support you but usually you won't be certain where they stand, and therefore they fall within the three star category.

You will spend ample time serving these people because they are worth your time, but four and five star clients come first and receive the majority of your time.

### *Two Star Clients*

These clients are worth including in your database but fall low on the totem pole. Two stars mean you don't know them or view them as being a good use of your time.

If you feel two star clients do not have the potential to move up the ladder, then remove them from your database and save yourself time and money. Spend your time on the higher stars and focus on the two star clients only when you have time.

### *One Star Clients*

In this system there is no such thing as a one star client. If they can not be a two star client, then delete them. One star clients may be "jerks" or just people who rub you the wrong way. They may be past two star clients that you decided for whatever reason not to include anymore.

Always have a good reason for deleting people from your database because not hearing from people is not a good enough reason.

Call people who you may doubt keeping on the list and just ask them about what they think of your service and then decide from their response whether to delete them or not.

As you insert people in your database program you will note which star they are, so you can plan accordingly for activities based on client's ratings.

You will be conducting Phone Calls, Personal Notes, Stop Overs, and the star system will determine the frequency you "touch" these clients.

Regardless of how many people are included in your database, your three, four, and five star clients will receive most of your time and energy accordingly. This sorting system will help you determine how to spend your time and energy.

The following break down is recommended based on a proven frequency that contacts clients an appropriate amount of times.

#### *Phone Call/Personal Note*

- Five and Four Star Clients - minimum once every other month
- Three Star Clients - once per quarter
- Two Star Clients - twice a year

#### *Stop Overs*

- Five and Four Star Clients - once a quarter
- Three Star Clients - twice per year
- Two Star Clients - your choice after achieving the above recommendations

### **Referral Tagline and Script**

The referral tagline is the language that should be at the end of every typed correspondence to a client. The purpose of this language is to always end any correspondence by asking and letting people know you would like their referrals.

Here is what it looks like.

*Any Correspondence*

*In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!*

*Referral Language - for business related conversations*

Further, at the end of all conversations including Stop Overs and Phone Calls (excluding Important Dates) should always end by asking for referrals. Use the following language:

*I want to make sure you know you can call me for any reason because I am always here to help. Also, I am always looking for more people like you to serve, so please let me know if you come across someone who could utilize my services. (Let them respond)*

*Handwritten Notes*

Any hand written correspondence uses the same approach, but shorter as to not take up too much space.

*With Gratitude,  
(Your name)*

*Your referrals are the life-line of my business. Thank you!*

## The Perfect Day

This system involves providing exceptional service to your past, current, and future clients. Many agents waste much of their time. An effective use of your time will garner better results and allow you more free time.

*The Perfect Day* is an example of what a great day working *The Real Estate By Referral Operations Manual* can look like. It is very deliberate regarding the amount of time you are working with current clients and working to build relationships and earn referrals.

This is a sample guide and highly recommended to implement into your business.

**Note:** The 10:00 and 3:00 time slots are bolded because these activities must be done everyday without exception in order to establish consistency and build your business.

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6:00 - 7:30	Relationship Building Appointments
7:30 - 7:45am	Get Organized
7:45 - 8:00am	Attend to Emails
8:00 - 10:00am	Current Transactions - paperwork, offers, files, updating system
<b>10:00 - 11:00am</b>	<b>Activities, Handwritten Notes, Phone Calls, Stop Overs</b>
11:00 - 11:30am	Miscellaneous - emails, return phone calls, organize desk, etc
11:30 - 1:00pm	Lunch - Building Relationships
1:00 - 3:00pm	Current Transactions - paperwork, offers, files, updating system



**3:00 - 4:00pm**      **Activities, Handwritten Notes, Phone Calls, Stop Overs**

4:00 - 4:30pm      Get ready for evening appointments, plan for tomorrow, emails

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### **Relationship Building Appointments**

Many agents set coffee or breakfast appointments at 7:30am or later which severely cuts into their day. These appointments are a great way to strengthen your relationships, but wake up a little earlier and make the most out of your morning.

Pushing your schedule back and starting your morning late means not getting to the other important activities that must be done every day.

Adhering to this recommendation means you get home sooner if you don't have any evening appointments.

Refer to the lunch appointments below to see how to handle Relationship Building Appointments.

### **Get Organized**

The first fifteen minutes of every morning should always begin with preparing for your day. What do you plan to accomplish?

Make a list of how many notes you plan to write and phone calls you will make and to whom (refer to the Notes and Phone Calls section regarding recommendations).

View your schedule to plan the preparations for your appointments that day.

Be very deliberate about creating your day because once you do what is on the list, you are done and you can go home. Never just stay in the office doing nothing.

Do what you choose to be done and then leave and enjoy your life!

### **Attend to Emails**

Emails are one of the biggest distractions an agent faces. You will notice there are three times listed on the *Perfect Day* schedule to attend to email.

In the morning it will be important to get these emails off your plate.

Always be responsive to your emails, yet this does not mean answer emails as they come. Attend to emails first thing in the morning at 7:45am, again before lunch at 11:00am, and then again at the end of the afternoon at 4:00pm.

You will be surprised at how much more effective you will be following this one simple step.

### **Current Transactions - paperwork, offers, files, updating system**

During this time period you should be working on current transactions. This means focusing on real estate activities like negotiating deals, talking with current clients, returning phone calls, updating client checklists, etc.

This is the time to serve the buyers and sellers who are using your services now. Use this time effectively to do whatever needs to be done during this time.

If you are not very busy with active clients or have some extra time, then use this valuable time to build relationships. Schedule a time to have coffee with someone to learn more about them or write more personal notes and make more calls.

Always look to reach out to the people in your database.

It will yield results!

Refer to the *Gratitude Program* for additional information and ideas for extra time you have available.

### **Activities, Handwritten Notes, Phone Calls, Stop Overs**

This scheduled time MUST ALWAYS be completed. Connecting with your clients is imperative to this system achieving its maximum potential.

You may feel you are very busy, but your business depends on continuing to build relationships and receiving referrals.

If you do not perform these activities on a regular basis, then you will see an up and down flow in your business.

Consistency is the key. Set a goal regarding activities and if you reach your activity goals, then use the afternoon time to catch up.

Always perform notes and calls at this designated time because it is a good time to catch people at work. You can write notes regarding interactions the previous evening or to people you just spoke to on the phone.

Use the 3:00 activity time slot to make any additional calls and notes that need to be written from lunch or morning calls.

If you find you never use the afternoon time to perform activities, then you need to increase your daily goals.

Not using this time effectively or failing to perform these activities diligently will be hazardous to your business. The success you will have using this system is directly related to how well you manage your time and perform these relationship building activities.

Spending two hours a day performing these activities are what will make your business prosper, and it is also fun!

### **Miscellaneous - emails, return phone calls, organize desk, etc.**

Utilize this time to catch up or address whatever needs your attention. Take a minute to confirm your lunch and catch up on emails. Prior to leaving for lunch, make sure you had a very productive morning.

Prepare any items you need and organize your thoughts for your lunch appointment.

### **Lunch - Building Relationships**

Having lunch with someone in your database or a potential addition to your database is a wonderful use of your time.

When you begin implementing this system, it is recommended to have lunch every day with each of your Four and Five Star clients. Always use lunches as an opportunity to build relationships, but also let your clients know that you are running your business completely by referral now.

Explain that you will be spending your time providing exceptional service to past, current, and potential clients rather than marketing to strangers.

Convey how this creates a Win/Win situation because clients receive first class service and you don't have to spend time prospecting.

Once you have fully implemented this system, use lunch to stay in touch with people and catch up on their lives. Every time you have a lunch or meet with someone, identify one way you can help them.

Whether it is an encouraging word, a recommendation to a book regarding something they are dealing with currently, or a referral to someone you know that they need.

Always look for the opportunity to help and serve people.

Ask more questions and listen more than you talk. Always ask them about business and let them know things are going well without bragging.

Anytime the business discussion comes up, it is an opportunity to ask for referrals using the referral language.

Lunch is the perfect way to connect with people and effectively use your time.

It is not important that you pay for lunch, but if it is a Four or Five Star client, then it is worth considering.

Always remember to send a hand-written personal note immediately after the appointment sharing that you enjoyed meeting with them, referencing things you discussed, and offering any support where possible.

### **Prepare for evening appointments, plan for tomorrow, emails**

Make sure you end your day on the right note. If you have an evening appointment, then make sure everything is fully prepared. Attend to any afternoon emails and return any calls that need attention.

Look at your schedule for tomorrow and see if there is anything you need to do for an early appointment. Evenings are often a great time to perform Stop Overs so consider that possibility.

Now that everything is finished for the day and assuming you have no evening appointments, it is time to go home.

Do not fool yourself into thinking you are working hard by just mulling around the office into the evening unless you have something productive to do.

Go enjoy your life - that is one reason why you have chosen to work by referral!

## Writing Goals

Having goals is something most people have heard is beneficial, yet many people never take the time to sit down and actually write them. The true power of goals comes when people write their goals down on paper because at that point, they become real.

This exercise will be the single most important thing you can do to move toward designing the business you intend to build.

Proper goal setting will yield amazing results, and the better you get at writing your goals, the better your business and life will become.

As with anything in life, it all begins with starting somewhere and getting better with practice.

It is recommended to write goals in the following five areas: spiritual, financial, family, personal, and business. The crucial aspect regarding goal setting most people do not understand is to write your goals in the present tense as an affirmation.

Your subconscious mind will take this affirmation as truth and your life will begin to change before your very eyes.

Sometimes this is difficult for people to comprehend in the beginning, but if they do as instructed, they will witness the change and become believers.

Anything is possible when we believe it is true. Also, in some cases it is good to include the date the goal will be achieved by.

Below are the five main goal categories to focus on and examples.

- *Spiritual*      I read one spiritual book a month.
- *Financial*      I net over \$100,000 in income this year.
- *Family*          I spend more time with my family by watching less Television and planning my time with them.

- *Business*      I sell 15 homes with an average sales price of \$200,000  
by next            year at this time (insert actual date).
- *Personal*        I go to the book store for one hour, once a week for my  
dream time.

After you have set three meaningful goals in each of the five categories, take five minutes each morning to read these goals aloud. While you are reading your goals, close your eyes and visualize them coming true as if they have already happened.

Feel and see your goals manifesting because you are slowly reconditioning your mind to change the way you think.

Always focus on what you WANT rather than what you don't want because we attract what we focus upon.

When you feel excited about your future and your energy level is higher, you will begin to attract what you desire most. When you focus on negative outcomes or what you don't want, you will also attract what you don't want.

I have come across some great goal setting software that walks you through exactly how to set goals that will be achieved. It is called **Achieve-It** goal software and you can learn more about it by [clicking here](#).

Another very beneficial activity you will want to incorporate into your daily routine is using success affirmations. Write down a few with your goals and read them every day. Here are a few examples...

### **Success Affirmations**

I draw success, abundance, and good things to me.

I surround myself with wonderful, successful people.

My life is filled with complete abundance. I have everything I want and need.

I am living the full life I want. I have a wonderful family, a beautiful home, the car I have always wanted, and I can travel whenever and wherever I want.

I have a winning, persuasive personality, and when I eagerly tell people about my business, they are eager to participate, too.

I am strong, powerful, and have absolute control over my life. I have attained my goal of making \$100,000 a year in my own business.

## Make Your Business Prosper

Your real estate career will be what you make it, but before you can create the business you want you have to know what you would like it to look like.

Do you know?

For your business to grow into what you want, it is absolutely vital you clearly know how you want your business to look in the next few months and years.

You also need to **believe** it is possible to create the exact real estate business that you envision.

Many people have no idea what they want, and therefore, they never get what they want. This system works very well, but if you know where you are going it will work much better.

It is recommended to do the following exercise prior to beginning this system.

This exercise can be one of the most important things you do to achieve great success within this system. First, you need to find a place that is absolutely quiet and peaceful.

Make sure your spirits and energy level are high, and you have at least one hour to perform this ultimate dream exercise. Many people find it best to perform this activity in the morning or after they have recently exercised, prayed, or meditated.

### Visualization Exercise

Take a few deep breaths and close your eyes to begin (soft classical music in the background is highly recommended).

Get relaxed and completely present.

Now imagine exactly what you would like your ideal real estate business and life to look like and don't hold back.

Anything is possible in this exercise so just picture exactly what you would like your business to be and how it will unfold. Also, picture how your business fits into your life and how they work together to make you happy.

Feel it, smell it, taste it, and see yourself already living that life and having that business. Envision the grandest version of your future life and do not worry about how it will happen - just focus on what you want your life to look like.

Do this for about five minutes.

Next, open your eyes and take twenty to thirty minutes to write down where your business will be in six months, one year, and three years (and further if you wish) based on what you just envisioned in the visualization exercise.

Date the top of your page six months, one year, and three years from today's date and treat this like a journal entry as if you are writing on that day.

Write out where your business will be at that time, who you will be for your clients, and why you want to have that kind of business.

***Example***

*Today it has been six months since I began using the Real Estate By Referral Operations Manual and it is amazing what has happened. I am now...*

*Today it is one year since...*

*Today it is three years since...*

Write exactly how and what you will feel like on that day now that your dream business has come true. Make sure you write this journal entry in the present tense as if it has already happened.

Read these entries once a week and act as if it has already happened.

Experience how great it feels to create the business and the life that you have just visualized into being. Picture it and know that it is happening. It is no accident this system has found its way to you. You deserve the business and life you want!

## The Three Week Implementation Plan

It may seem like there is a lot of work to do to implement this system. Please do not worry because Rome was not built in a day. This system will take some time to incorporate into your business. The quicker you do so, the better.

But if you need more time than what is recommended, just set a deadline date for when you plan to have the following plan complete so it does not stretch out to a couple of months.

Every component of this manual will have an impact on your business. As you implement new aspects of this manual, your business will begin to change and evolve.

The plan presented below assumes you will begin on a Monday. You can begin at anytime and just follow the plan in order regardless of the day you start.

If you finish the implementation tasks for that day and have more time, then by all means continue and get up to date quickly. On the other hand, do not get overwhelmed.

Each plan activity is designed to not take longer than around an hour.

### Week 1

#### Monday, Day 1

- Read entire manual through at least once, twice is better.

#### Tuesday, Day 2

- Decide on Calendar Program, Database Program, and begin researching newsletters.

### Wednesday, Day 3

- Choose newsletter provider and sign up, organize and buy necessary materials for filing system, create file folders.

### Thursday, Day 4

- Create Buyer Checklists and Seller Checklists, update current clients checklists.

### Friday, Day 5

- Create your database, follow the instructions in the database section (this may take some time so work on it when you can, get it done as quickly as possible).
- Refer to The Perfect Day and devise your schedule to begin performing the recommended activities in the Gratitude Program.

### Saturday, Day 6

- Weekend, continue following plan or take off and enjoy!

### Sunday, Day 7

- Weekend, continue following plan or take off and enjoy!
- 

## Week 2

### Monday, Day 8

- Send out the New Business Approach Letter to your entire database. Include business cards.

### **Tuesday & Wednesday, Days 9 and 10**

- Take all Buyer materials and insert your information including logos.
- Create a folder in *My Documents* called *RealEstateByReferral* and then create subfolders called *Buyer Letters* and *Buyer Presentation*.
- Save all of the documents in the appropriate subfolder (if you have company letter head make sure it aligns correctly so it is easy to print whenever you need to send a letter).

### **Thursday & Friday Days 11 and 12**

- Take all the Seller materials and insert your appropriate information including logos.
- Create subfolders called *Seller Letters* and *Listing Presentation* in the *RealEstateByReferral* folder.
- Save all the documents in the appropriate subfolder (if you have letter head make sure it aligns correctly so it is easy to print whenever you need to send a letter).

### **Saturday, Day 13**

- Weekend, continue following plan or take off and enjoy!

### **Sunday Day 14**

- Weekend, continue following plan or take off and enjoy!
- 

## **Week 3**

### **Monday and Tuesday, Day 15 and 16**

- Take all the Gratitude Program documents and insert your appropriate information and possible logos.
- Create a subfolder called *Gratitude Program* in the *RealEstateByReferral* folder.
- Save all of the documents in your *Gratitude Program* folder for easy reference (if you have letter head make sure it aligns correctly so it is easy to print whenever you need to send a letter).

### Wednesday, Day 17

- Go purchase the necessary items for your Listing Presentation Folder.
- Print and organize the documents to have it ready for future listing appointments, include your information, make any necessary changes, add your logos if you so choose.

### Thursday, Day 18

- Read the entire manual again, it is very important to grasp the principles of the entire system and how everything works together

### Friday, Day 19

- Plan your next two *Stop Over* ideas.
- Schedule the date you will perform *Stop Overs*.
- Buy the necessary *Stop Over* materials.

### Saturday, Day 20

- Set your weekly goals regarding activities, yearly goals regarding income objectives.
- Perform the Visualization Exercise.

### **Sunday, Day 21**

- Enjoy your day off, tomorrow begins the full implementation, everything is ready to go so follow the system (refer to you checklists and Gratitude Program for guidance).

Important Note: all documents are currently in adobe.pdf format and you will need to copy and paste these documents into a word processing program where you can make any necessary changes (ex. Microsoft Word).

Follow the system and enjoy your life!

## Buyer Addendum Documents

The following pages consist of the documents referenced throughout this manual. They can easily be copied and pasted into your computer.

Make sure to insert your information and align the document properly so when you print it you will not need to make any alterations. These steps will save you lots of time and headaches.

A little bit of effort now will go along way to make this system much more efficient.

As you insert you information, take each document and save them into their appropriate folders as referenced in the *Three Week Implementation Plan*.

Note: the documents listed below are in Times New Roman 12 font for your convenience to cut and paste them into your folders.

Date

Client Name  
Address

Dear (client's first name),

### **Phase 1 Is Now Underway**

It was an absolute pleasure meeting with you recently! I am very excited about serving you and helping you achieve your home buying goals. I am confident that we can attain your objectives and find the perfect home that meets your needs.

We are now in the process of *Phase 1* of the home buying process. Once I get the pre-approval amount from the mortgage company, I will execute the automatic home search based on the criteria we discussed in our meeting. When there are a number of quality homes that you would like to view, simply provide me with the MLS numbers, and we will schedule a convenient time to see those homes. Once we find a home that meets your criteria, I will thoroughly explain the purchase agreement to you so that we can make an offer based on your objectives. I will help negotiate a beneficial contract on your behalf, and upon acceptance, we will move into *Phase 2* of the home buying process.

I look forward to starting and completing this exciting experience with you. I intend to provide you with exceptional service that exceeds your expectations. During this process, please do not hesitate communicating to me any questions or concerns. Thank you very much, and I will be in touch soon!

With gratitude,

Your name  
Your company Phone  
number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

Date

Client Name  
Address

Dear (client's first name),

## Phase 2 Is Now Beginning

Congratulations! We have completed *Phase 1* of the home buying process. We are now moving into *Phase 2* which involves the home inspection, finalizing financing, homeowner insurance, changing the utility information, and the closing.

I will attend the inspection regardless of whether or not you can be there, yet I highly encourage you to be present so that you can see and hear what the inspector shares in his/her report. In the coming weeks, it is important that you provide the mortgage company with all the necessary documents and information that they may request from you. I will stay in touch with the mortgage company and monitor the progress to make sure everything is on track for closing. Also, please call your insurance company in order to obtain the details and commitment concerning your home owner's insurance policy if you have not already done so.

Near the scheduled closing date, I will provide you with the utility information for your property so you can make the appropriate changes as of the possession date agreed upon in the purchase agreement. I will also review what will occur at closing and answer any questions that you might have as we near the closing date. Please contact me if you have questions regarding anything. I will be in touch again soon. Thank you!

With gratitude,

Your name  
Your company Phone  
number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

Date

Client's Name  
Address

Dear (client's first name),

### **Utility Information/Mail Packet**

The closing on your new home is approaching soon, and it's time to start thinking about moving! I don't want this to be a stressful, chaotic time, so in this packet, you will find some items to help you achieve a successful, organized move.

I have included an official change of address kit and a list of services/companies you will need to contact a few days before the closing to change your information (trash, phone, electricity, etc.). If I can be of any assistance or answer any questions, please feel free to give me a call. I am always available to assist you!

With Gratitude,

Your Name  
Your Company  
Your Phone Number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

Date

Client Name  
Address

Dear (client's first name),

### **Phase III: It's Official!**

Congratulations! You are officially the proud new owner of a beautiful home. It has been my pleasure serving you, and I am extremely excited for you. Please know that this is just the beginning of the service I intend to provide you during the coming years.

On that note, I also wanted to take the opportunity to remind you of my *Gratitude Program* which will continue to be presented to you. I will also be sending you a reminder and instructions in a couple of months explaining how to register for your Homestead and Mortgage exemptions.

I would like to thank you again for the opportunity to serve you. It truly is my pleasure, and I am very much looking forward to building a lasting relationship with you. I would greatly appreciate you taking just a second to fill out the enclosed questionnaire so that I can make sure I am serving my clients to the best of my abilities.

Thank you again, and I will be in touch soon!

With gratitude!

Your Name  
Your Company  
Your Phone Number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

## AGENT EVALUATION FORM

Client Name: \_\_\_\_\_

We would appreciate if you would take a few minutes to fill out an evaluation on my service to you.

- |  |      |      |      |           |           |
|--|------|------|------|-----------|-----------|
| 1. Do you feel I represented you appropriately?                | Poor | Fair | Good | Very Good | Excellent |
| 2. How would you rate my overall knowledge?                    | Poor | Fair | Good | Very Good | Excellent |
| 3. Please rate my accessibility to you.                        | Poor | Fair | Good | Very Good | Excellent |
| 4. How would you rate my professionalism?                      | Poor | Fair | Good | Very Good | Excellent |
| 5. How effective do you feel I was as a negotiator?            | Poor | Fair | Good | Very Good | Excellent |
| 6. How well did I serve you through this transaction?          | Poor | Fair | Good | Very Good | Excellent |
| 7. Was The Weber Team able to determine your purchasing needs? | Poor | Fair | Good | Very Good | Excellent |

8. What areas do you feel I could improve my services? \_\_\_\_\_

---

9. What did I do well while serving you? \_\_\_\_\_

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11. Based on my service to you, would you confidently refer my services to your friends and family?

*If so, do you know anyone who might be buying or selling their home in the next few years that I could start developing a relationship with now?*

Date

Client Name  
Address

Dear (client's first name),

## **It's Time To File Your Exemptions!**

Hello! I wanted to let you know that it would now be a good time to file for your Mortgage and Homestead exemptions if you haven't already done so. Filing for these exemptions is very important because it will decrease your property taxes. In the event you do not remember discussing this at closing, please give me a call and I would be happy to review the importance of filing these exemptions.

To make this process as easy as possible for you, I have enclosed the address and directions from your home to the Assessor's office in your area. I have also provided your HUD 1 closing statement that you received at the closing which will help the Assessor's office in filling out the application. This process will only take a few minutes, and it is well worth the money you will save. Please let me know if you have any further questions, and don't ever hesitate to call me for any reason. Thank you!

With gratitude,

Your name  
Your company Phone  
number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

Date

Client Name  
Address

Dear (client's name),

### **TAX TIME IS NEAR!**

Tax time indeed is quickly approaching, and your accountant might be asking you for a copy of the HUD 1 Settlement Statement on the property you purchased this past year. Moving can be very hectic, and you may not have this important document readily available. Please give me a call if you are unable to easily find this document in your files, and I will be happy to mail it to you.

Wit is my intention that you benefit from any and all of the tax advantages possible from your transaction. If your accountant has any questions, please have them call me a call. I would be happy to help in any way possible.

I look forward to continue serving you in the best possible manner!

With gratitude,

Your name  
Your company Phone  
number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

Date

Client Name

Address

Dear (client's first name),

## **It's Time to Get Ready!**

Finally, spring is almost here which means it is time to clean out the garage and prepare for the upcoming warmer months! It is very important to get your home ready for the summer so that you don't have any costly events occur that could have been prevented.

In my pursuit to continually serve you, I have enclosed a spring checklist to help guide you through getting your home ready for the summer months. I hope you find this helpful, and please don't ever hesitate to call me with any questions. Enjoy this beautiful time of year!

With gratitude,

Your name

Your company Phone  
number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

## SPRING & SUMMER CHECKLIST SEASONAL MAINTENANCE SUGGESTIONS

**Provided By:**  
**(Your Name)**

**Air conditioners** - Now is the time to check your outdoor unit for debris caused by leaves and grass clippings. Make sure there is at least 18 inches of clearance around the air conditioning unit to ensure adequate airflow. Periodic cleaning of the air conditioning lines and coil will reduce your electric bill as well as extend the life of your equipment. We recommend having a certified professional service perform seasonal maintenance.

**Furnace Filter** - Inspect each month and change as needed. Remember a clean filter can solve many cooling problems.

**Seasonal Balance** - Since hot air rises and cold air falls, an adjustment of registers may be required. Open upstairs registers and close registers on the first floor. Also, leaving the thermostat fan on the "ON" setting verses "AUTO" will help in keeping a balanced temperature in the home. Keep in mind that extreme temperatures will affect the performance of your system.

**Dryer Vents** - This vent should be cleaned frequently to avoid lint accumulation. This accumulation can cause longer drying time as well as moisture build-up in the vent line which could lead to damage to drywall and other surrounding areas.

### Exterior Items

**Exterior Caulking & Paint Touchup** - Inspect and replace caulk as needed, especially around windows at brick areas

**Concrete Sealant** - Drives, sidewalks, steps and porches should be treated with a silane/siloxane water repellent product to reduce potential damage from the elements. This product can be obtained at any local hardware store. Make sure to follow the manufacturer's directions. Caulk cracks with a caulking material prior to applying water repellent. Avoid exposing concrete to dry/liquid lawn & garden fertilizers, these chemicals can attack the surface of the concrete.

**Gutters and Downspouts** - Should be cleaned of debris. Check downspouts to ensure that splash blocks are positioned to discharge water away from the foundation.

**Landscaping** - When landscaping near the house, do not disturb the earth next to the foundation. Allow 6 inches of clearance between the grading and the outside wall of the

home. Maintain the areas next to the foundation to permit water to drain away from the foundation.

**Sprinklers** - Do not allow sprinklers to spray water on the exterior of the home. This could cause unnecessary moisture buildup to the foundation, basement and/or on the home exterior. When doors or windows are exposed to water for durations longer than their manufactured limitations, seepage may occur.

**Sliding Patio Doors/Screen Tracks/Window Tracks** - should be cleaned to maintain proper operation. Be sure to clean the weep holes on windows and sliders to allow moisture to escape.

**Exterior Doors** - Clean thresholds (adjust when necessary) and check the weather stripping (replace as needed).

**Garage Doors** - It is a good idea to have yearly maintenance check done by a professional. They can adjust, lubricate, and repair as needed.

## **Interior Items**

**Basements** - Check the sump pump to make sure it is operating properly and clean out sump pump pit as needed.

**Interior Caulking** - Inspect and replace caulking around tubs, showers, sinks and countertops as needed. The appropriate caulk is available at most hardware stores. Follow the manufacturer's directions carefully.

**Ceramic Tile** - cracks in grout should be re-grouted. This is a fairly simple process and the materials can be found at your local hardware store. Also, grout should be sealed periodically to prevent deterioration of the grout.

**Smoke Detectors** -Smoke detectors should be checked monthly for proper operation. Be sure to replace the batteries once a year.

**Faucets/Aerators** - Remove and clean the aerators on faucets and showerheads to allow proper flow of water.

Date

Client Name

Address

Dear (clients' first name),

### **Time To Prepare for Winter!**

Hello! It is that time of year again when the leaves change color and the days get shorter. Fall has arrived, and that means it is now time to prepare your home for the upcoming winter months. It is very important to get your home ready for the winter so that you don't have any costly events occur that could have been prevented.

In my pursuit to continually serve you, I have enclosed a fall checklist to help guide you through winterizing your home. I hope you find this helpful, and please don't ever hesitate to call me with any questions. Enjoy this gorgeous time of year!

With gratitude,

Your name

Your company Phone  
number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

## FALL & WINTER SEASONAL MAINTENANCE SUGGESTIONS

*Provided By: (Your Name)*

### EXTERIOR

#### Concrete

Expect concrete to crack. While cracking cannot be prevented, sometimes it can be minimized by:

- Applying a water repellent in the summer (product requires warmer temperatures to be applied properly)
- Filling cracks with an appropriate concrete caulking
- Filling in low spots or settled areas near/under walks, patios, porches or drives
- Draining water away from the slab/foundation
- Removing ice and snow as soon as possible, but never use de-icers or salts as some products will chemically attack and damage concrete. As alternate sources for traction, try using either cat litter or sand.

If you missed the timeframe to apply a water repellent (containing silane/siloxane) to exterior concrete (driveways, sidewalks, steps, and porches) during homeowner maintenance projects this summer, you will want to post a big reminder to do so in the spring. Application of a water repellent to exterior concrete helps reduce porosity and potential damage from the elements and street salts. Unfortunately, the city/county road maintenance, applies salt to the streets during the winter. Salt (concrete's enemy) is then carried by vehicles on to the drive and garage floor. Then the salt water drips from vehicles causing permanent damage to the concrete.

#### Exterior Caulking and Paint Touch-Up

Repair, caulk, and touch-up paint on exterior trim, doors, and windows. Be sure to replace caulk, as needed, around windows at brick areas.

#### Exterior Doors

Adjust or replace weather stripping and sweeps as needed. Check the fit of exterior doors at the thresholds. Adjust accordingly to keep out water, dust, insects and drafts.

#### Storm Doors

Be sure the storm door is vented to minimize heat build-up between the storm door and the exterior door. Review the manufacturer's recommendations for proper installation/venting. Always close the storm door so it latches tightly since the vacuum between the two doors could prevent it from doing so. If not, damage to the storm door and jam could result if the door is caught by winds.

#### Overhead Garage Door

It is a good idea to have a yearly maintenance check done by a professional. They can adjust, lubricate, and repair as needed.

### **Gutters and Downspouts**

Keep gutters clean from leaves and debris to avoid overflowing. Downspouts should direct water away from the foundation. Be sure splash blocks are positioned at the base of the downspouts to drain water away from the house.

### **Hose Bibs**

Disconnect garden hoses/attachments to hose bibs before freezing weather. Why risk water damage to the home from a frozen/burst pipe?

### **Ice Damming**

During the winter, ice and snow build-up on roofs and gutters block the water from running off the roof. This is called ice damming. As the ice and snow mass begins to form at the lower portion of valleys and gutters, the mass increases in size, pushes up and penetrates under the shingles, valleys, and soft it areas of the home. When snow and ice begin to melt and refreeze—having no place to go—ice will back up under the roofing material. This causes water to leak into the house. Since homes are made to shed water downward, this upward pushing of the ice is not normal and is considered an Act of God. If ice damming happens to your home, resulting in damage, please contact your insurance company immediately.

### **Pests**

If you have a problem with wildlife intrusion, contact a company who specializes in pest detection and removal.

### **Swales**

Be sure to keep rear swales unobstructed and in good condition to allow excess water to make its way to the drainage beehive. Over-seed this area with lawn grass seed (never sod) to establish a good residential-standard grass cover.

## **INTERIOR**

### **Frozen Pipes**

When the temperature drops below 32 degrees, some water pipes could freeze.

- Keep the home heated at a minimum of 65 degrees. Open cabinet doors in the kitchen so that warm air can reach pipes under the sink. This includes any rooms that have plumbing located on outside walls.
- Know where the primary plumbing shut-off valve is located and how it operates
- Insulate pipes (heat tape or weatherproof insulation) that are exposed to cold air, especially in the garage, basement, or crawl space.
- Let water flow at zero or below. Leave a thin stream of water dripping/running from all faucets in the home when the temperature remains below zero. Continuous water flow from at least one faucet can help keep either cold air or frozen ground from freezing pipes and plumbing fixtures.
- Remember, after a long cold spell, the ground can still be frozen even when the outside temperature is above freezing.

- When a pipe freezes, open a faucet at the end of the pipe to give the water some place to go after it thaws.
- Do not leave garage doors open for extended periods of time.
- If there is any damage to the home from a frozen pipe, contact your homeowner's insurance agent as soon as possible.

### Leaks

Moisture can cause costly damage to a home, so it needs to be addressed promptly. Leaky plumbing or sources of water penetration should be repaired immediately. Inspect and replace caulking around tubs, showers, sinks, and countertops as needed. Use the appropriate caulk and follow the manufacturer's directions carefully. Prevent moisture intrusion of any sort.

### Drains

Preventative maintenance helps you stay away from sewer cleaning bills. Fixing the drain is less disgusting than ignoring it. The first step in cleaning a drain is to make sure the clog is a local problem, not a systemic one. Plunger to the rescue! If two or more drains (toilets, sinks, washer, etc.) suddenly plug up, become sluggish or gurgle when used, call the plumber. Minimize use of toilets, showers, dishwashers, washing machines, etc. until an "all clear" is given.

### Heating System

Have you had your furnace serviced yet? The manufacturer recommends having a professional, seasonal maintenance done to keep the system running at peak efficiency. A seasonal maintenance and trial run in the fall are more convenient to determine service needs before winter hits. Balance registers and make other minor adjustments for seasonal changes. Vacuum registers and grilles to keep free of dust, dirt, and grime. Filters should be replaced once a month. Clogged/dirty filters are one of the main causes of system failures.

### Fireplaces

Before lighting, the damper must be in the full open position. Fireplaces with doors should always be operated with the doors fully open or fully closed. Refer to the fireplace manual for proper lighting and operating instructions. While fireplaces give a cozy atmosphere, they can be a source of drafts. To minimize drafts and loss of warm air, be sure the damper is closed when not in use.

### FYI's

#### Counter Tops

Towels and rubber drain mats left on counter tops can trap moisture underneath them. Water or other liquids left unattended can seep under sink rims and into joints/seams. Extended exposure of moisture to counter tops can cause the laminate to warp and blister. Please be careful.

#### "Drop-in" bowl cleaners

Can cause deterioration of some internal parts in the toilet and void the manufacturer's warranty.

### **Dryer Fire**

Blocked lint screens or build-up in the venting system can start a fire. If the lint screen is clogged, or, if there is an obstruction in the vent, the drying time is longer, and eventually moisture build-up in the vent line can result causing damage to drywall and other surrounding areas. Clean the lint screen before each load.

### **Faucets/Aerators**

Hard water prevails in this area. Minerals can enter the supply line and cause faucets to drip because the washers wear more rapidly when they come in contact with foreign matter. Periodically remove and clean the aerators on faucets and showerheads to allow the proper flow of water. Consider a water softener unit to reduce hard-water problems.

### **Smoke Detectors**

Dust or vacuum to keep dust and debris from interfering with sensors. Test by pushing the test button on the smoke alarm cover until the alarm sounds, then release. The alarm sounds if the electronic circuitry, horn, and battery are working. If no alarm sounds, the unit may have a defective battery or other failure. Refer to the operating manual for detailed instructions.

### **Electrical Outlets**

Save time and service calls. Check GFI's before calling the electrician. It might just take a simple reset to resolve the problem.

**PLAN REGULAR SEASONAL MAINTENANCE. Deferring maintenance now can lead to costly and extensive repairs later.**

## **Buyer Presentation Questions**

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1. What is the most important aspect about buying a home to you?
2. In what manner do you prefer to be served during this transaction?
3. In the past, while buying something from someone can you share with me something you liked and something you did not like about the process?
4. In the past, when you refer someone what has been your criteria?
5. What are you most worried about regarding this transaction?
6. If everything were to work out perfectly, tell me exactly what would happen?

## Home Buying Process

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### *Phase 1*

- By Referral Only
- Pre-approval Process -  
Estimated Expenses
- Devising a Game Plan
- Conducting Effective Searches
- Making an Offer, Counter Offers

### *Phase 2*

- Purchase Agreement Acceptance
- Earnest Money, Inspection Response
- Finalizing Financing
- Home Owner's Insurance
- Utility Info/Moving Packet
- Settlement Statement, Closing

### *Phase 3*

- Change of Address Postcard
- Housewarming Party
- Exemption Reminder Letter
- Seasonal Checklists Reminder
- After Sale/Client Appreciation Program

# Conducting Effective Searches

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## *Online*

Go to **(insert your website)** and click the *Properties* link located on the perimeter of the logo on the home page. Input the appropriate information that we discussed at our initial meeting regarding your needs. Identify possible homes that meet your criteria. If the home fits your criteria and the picture looks respectable, then make a note of the homes that have potential. Try not to eliminate homes by picture only unless it is obvious that it does not meet your needs because sometimes pictures are deceiving. I will devise a search that emails you any new homes that automatically fit your criteria.

## *Pre-Viewing*

When you find time, drive by the houses and neighborhoods that you have designated as having potential. Evaluate your interest and determine which homes you would like to actually view. Make notes of each home that you want to consider, and any possible questions that you might have regarding the home. Email me the MLS numbers of each of the homes and let me know when you would like to view these homes. By first previewing the homes, it will make your search more efficient because we will not waste any time viewing homes that fail to capture your interest. We can instead concentrate on viewing more quality homes that meet your wants and needs.

## *Viewings*

Once we actually enter the home, examine everything thoroughly. Turn on lights, check all of the closets, and examine appliances and decorating that will stay. I will help identify necessary things to consider and possible attractive/unattractive features that would have an impact on the resale. Obviously, the furniture and decorating style will all be different, so try to imagine it with your style and home furnishings. Also make notes of things you like regarding each home and things you do not like to help you remember the home. Rate the house from 1-10. A 10 rating is a home that matches all your wants and needs. While a 1 rating fails to contain anything you like or want. By following these methods, we will conduct an effective search and ultimately find a home that meets your objectives.

# Buyer Profile

(Client Name)

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## *Needs - Must Features*

- Minimum Bedrooms
- Minimum Bathrooms
- Minimum Square Footage
- Location
- Price Range
- 2 Story (Y/N)      Fence (Y/N)

## *Wants - Specific Features*

What features would you enjoy having but are not absolutely necessary?

- 
- 
- 
- 

If I could wave a magic wand and find the ideal house for you, what would it be?

## *Game Plan*

Time Frame-

Motivation/Frequency of Viewings-

Birthdays/Anniversary-

Date

Client Name

Address

Dear (client's first name),

### **Please Buckle Your Seatbelts & Prepare For Takeoff!**

I hope you are as excited as I am to begin this journey, and it is my intention that this experience is similar to a first class flight for you. Prior to taking off, I have some very important house keeping items that need your attention. Please review the enclosed checklist that we discussed at our recent meeting and let us know if you have any questions.

Preparing your home for sale is a crucial aspect that most people take for granted. Staging your home effectively for future showings will play a major role in helping us achieve the goals that we have devised. Please make sure you rearrange the furniture as we discussed in our recent meeting.

The enclosed and previously discussed recommendations will play a major role in helping us achieve our selling goals. I want to get you to your destination on time without any hassles, so please don't ever hesitate to let me know how we can make this experience more enjoyable. I am very excited about serving your needs. Thank you!

With gratitude,

Your Name

Your Company Phone

Number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

Date

Client Name

Address

Dear (client's first name),

## **We Have Liftoff!**

Congratulations! Your home is now listed on the market and ready for sale. Properly staging your home can make the difference between selling and not selling your home. Therefore, it is extremely important to follow the guidance that I have provided.

Also, I have devised the *Home Selling Game Plan* based on the feedback we received at our initial meeting. Please carefully review the enclosed game plan to make sure I have accurately portrayed your goals and simply give me a call if there are any additional items that need our attention.

It is very important to me to provide you with first class service through continual communication, proven marketing strategies, and strong negotiation skills. Please feel free to call me with any questions or concerns that you might have during this process. Thank you for the opportunity to serve you, and I will be in touch soon!

With Gratitude,

Your name

Your company Phone  
number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

Date

Client Name  
Address

Dear (client's first name),

## **The Runway Is In Sight!**

Great news! We have an accepted purchase agreement and only a short distance toward realizing our selling objectives. The buyers will soon be scheduling a home inspection time. If there are any items that you presently know need to be repaired, then it would be in your best interest to fix them prior to the inspection. Repairs that need attention could potentially be costly and create unnecessary problems.

Once the upcoming inspection has been performed and our response is found satisfactory to both parties, we will then schedule a convenient time for the closing. I will also be providing you with directions to the title company for the closing.

During this period, I will be making sure the buyer's financing is on track for closing and that all items in the purchase agreement are being followed so that everything proceeds smoothly toward closing. I am always available if you have any questions or concerns, so please do not ever hesitate to call me. I will be in touch soon with an update. Thank you!

With gratitude,

Your name  
Your company Phone  
number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

Date

Client Name  
Address

Dar (client's first name),

### **Thank You for Flying!**

I hope your home selling experience has been an enjoyable ride! It has been my pleasure serving you, and I look forward to continue providing you with first class service for many years to come.

My service standards are very important to me, and I am constantly looking to make improvements. Therefore, it would be helpful if you could please take a few minutes to complete the enclosed questionnaire and mail it back me us in the provided envelope. I would sincerely appreciate your time in helping me "fine tune" my business.

This is a very exciting time and just the beginning of my journey together. I am here to serve your needs, so please do not ever hesitate to call me for any reason. Thank you again for choosing my real estate company!

With gratitude,

Your name  
Your company Phone  
number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

## Pre-listing Questions

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1. How long have you lived in your home?
2. What do you feel are the most attractive features of your home?
3. How much did you pay for your home?
4. What, if any, improvements need to be made?
5. What is a rough estimate of your payoff?
6. What do you believe your home is worth?

## Seller Presentation Questions

---

1. What's the most important aspect of selling your home?
2. In what manner do you prefer to be served during this transaction?
3. In the past, while involved in a service transaction with someone can you share with me something you liked and something you did not like about the process?
4. In the past, when you referred someone, what has been your criteria?
5. What are you most worried about regarding this transaction?
6. If everything were to work out perfectly during this transaction, then tell me how things would unfold?
7. Lastly, I like to recognize birthdays and anniversaries as part of my Gratitude Program. What is your birthday (get entire family birthdays) and your anniversary?

## **Our Corporate Mission**

Turning Dreams into Reality

## **Our Declared Values**

- Unlimited thinking is fundamental.
- Passion is vital toward all achievements. • A commitment to creating a better world.
- Inspire a community of giving and prosperity.
- Create an optimal business culture through motivated and positive people.
- Integrity and trust are integral in building meaningful relationships.
- The continuous pursuit of excellence is our minimum standard.

## **My Promise to My Clients**

I will provide unparalleled service while exceeding expectations. I will continuously strive to improve ourselves and my business so that I may diligently serve people in the best possible manner.

**What are you most  
concerned about regarding  
this transaction?**

## How I Run My Business

---

### *100% By Referral!*

### **Benefit to My Clients**

***Time*** Increased time spent with clients due to not having to prospect for additional business.

***Service*** Able to concentrate on providing world-class service.

\* My business relies exclusively on receiving referrals so providing extraordinary service and delivering great results is crucial my business success and growth.

## Menu of Services

---

Maximum Exposure, MLS, All Major Websites  
Realtor.com Enhanced Website  
Devising a Game Plan (systems to achieve goals)  
Communication (accessibility and frequent contact)  
25 Day Feedback Questionnaire  
Open House Philosophy  
Direct Phone Line Sign Advertisement  
Feedback Activity Log  
Aggressive Negotiation Skills  
Proactive Selling (Agent Networking)  
Agent Relationship Building  
Flyers/Showing Packets  
Preparation Checklist - How To Get Top Dollar  
Staging Recommendations  
Showings  
5% to Charity of Your Choice  
Post Sale/Gratitude Program

## What Makes A Home Sell?

---

**Besides location, what crucial components make a home sell?**

- Price
- Preparation

**Why did you buy this home?**

Buying is based on emotion - buyers see something they like in a house and buy it or see something they don't like and eliminate it.

### **Preparation**

-Your home must be clean and organized for a buyer to feel comfortable.

-Any defects must be repaired to get maximum dollar.

### **Importance of Price**

-Overpriced homes are often not even considered.

-When homes are on the market too long, buyers assume there is a problem or defect.

-Incorrectly priced homes usually end up costing sellers more money (extra mortgage payments and less leverage for negotiating due to how long it was on the market).

## Basic Real Estate Theory

---

### How the Real Estate Market Works

- Interest Rates
- Supply & Demand
- Location

The sale of a home is not based on what a homeowner thinks their home is worth. Instead, it is based on what a buyer is willing to pay. What the buyer is willing to pay is based on what the market dictates (past and present value).

### Comparative Market Analysis

- Includes past and current homes that have similar characteristics and location.
- Uses active listings, pending, sold homes preferably in the last six months.
- Determines a fair, appropriate, and reasonable price based on the information that is available.

**An over priced home will cause frustration and will serve no beneficial purpose!**

**The most crucial time in marketing your home is the first 45 days!**

## **My Goal Is To Sell Your Home:**

**- Fast**

**- For Top Dollar**

**- With the Least Amount of Hassle**

**- To Provide Service That Greatly  
Exceeds Your Expectations.**

*Example*

## Home Selling Game Plan

---

**Preparation Checklist Completed:** *insert exact date checklist was completed*

**List Date:** *specify listing date, lockbox on door, sign in yard*

**Flyer Packet Completed:** *when the flyer packet was completed or will be completed*

**Pending Goal:** Within \_\_ days of list date or sooner (*base days on avg. market time*)

**Purchase Price Goal:** *list discussed price range*

**Showing Review:** A representative from my office will be contacting you to confirm any potential showings. Please make every effort to accommodate any showings that are within reason. Keep your home in near showing condition at all times in case someone wants to see it very soon.

**Staging Review:** Please make sure the home is very clean, nicely organized, and smells great. The preparation checklist that I provided you should be completed including the staging items.

**Showing Feedback:** We will be contacting you after we receive feedback for each showing to share the information from the showing agent. We will discuss the feedback with you to determine if there are any proactive steps that can be taken to help sell your home.

**Communication:** Each Monday we will contact you to discuss any recent events and answer any possible questions. Please don't ever hesitate to call us anytime.

**Sell Your Home Fast, For Top Dollar, With the Least Amount of Hassles!**

*Example*

Client Name: Krieg

### Feedback Activity Log

Date

Agent

---

5/13/2006

Joe Smith

Feedback - Liked house & loft area upstairs. Thought the double lot was really nice. Clients are coming back on Sunday may take 2<sup>nd</sup> look then. Didn't like 1 car garage.

---

5/18/2006

Michael Simpson

Feedback - House shows very well. Good square footage and good sized lot.

---

6/14/2006

Shonda Skinnard

Feedback - This was a pretty neat house. We loved what they did to the upstairs. It was very warm up there though, compared to the rest of the house. Also, this was my mistake, they really need more than a one car garage. Good condition and priced ok.

---

6/22/2006

Rachel Seller

Feedback - House showed very well - great condition but decided they wanted to be a little further north.

---

6/28/2006

Nancy Eachmore

Feedback - Good Condition, less interest than other properties. Somewhat met their criteria.

## Preparation Checklist

- Furniture rearranged as discussed
- Clutter removed as discussed
- Carpets cleaned, or replaced (if applicable)
- Floors polished and cleaned (if applicable)
- Faucets polished, sinks and tubs cleaned
- Baseboards touched up or repainted (if applicable)
- Walls touched up or repainted if needed
- Exterior repairs completed as discussed
- Landscaping addressed (mulch, weed, mow)
- Garage organized, clutter removed
- Front door cleaned or repainted
- Organize closets, remove excess clutter and clothes
- Remove unnecessary items from kitchen counter as discussed

Specific items that need attention: 1.2.3.

Date

Name  
Address

Dear \_\_\_\_\_ (client's first name),

## **New Business Approach!**

Hello! Recently, while reflecting on my real estate business, I came to the conclusion that my favorite aspect of my career is the wonderful people that I get to serve. While reflecting, I also realized that I was spending a significant amount of time and money on strangers rather than the people who have already given me their trust and support.

Therefore, I am very excited to announce that I have changed my business model. I will now be spending all my time serving people that I know and trust. I will be implementing a new *Gratitude Program* that I will be using to serve my past, current, and future clients on a continual basis rather than just during a transaction. I am not going to disclose all the aspects of the *Gratitude Program* here, yet I would like to convey that you will be receiving a newsletter from me once a month. This newsletter will be very entertaining and worth reading.

My *Gratitude Program* will include methods of service that I enjoy most toward serving people in a manner that I would like to be treated. My new business system will rely on serving clients in such a manner that I create a 100% referral business due to the exceptional service I provide to each and every client.

I will be implementing future aspects of my program so I will look forward to discussing my new business system with you in the near future. Thank you so much for your trust and support!

With gratitude,

Your name  
Your company Phone  
number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

*New Addition to the Database Introduction Letter*

Date

Name

Address

Dear \_\_\_\_\_ (client's first name),

My name is \_\_\_\_\_ (your name), and I am with \_\_\_\_\_ (your company). Recently, I spoke with \_\_\_\_\_ (referror), and (he or she) mentioned you as someone that I should possibly add to my *Gratitude Program*. \_\_\_\_\_ (referror) further conveyed to me that you are currently not in the market to buy or sell a home, but that you might be some time in the future. I would very much like to start building a relationship with you so that if and when a real estate need arises, then you will have a professional real estate agent who you know and trust.

I realize that I am presently a mere stranger to you. I take it very seriously that \_\_\_\_\_ (referror) provided me with your information, and I will not abuse (his or her) trust. I realize you have not previously utilized my services, but I plan to treat you like a client. I intend to earn your trust over time by serving you before a real estate need even surfaces.

I strive to serve people how I would like to be treated. Therefore, please let me know if you would rather not be included on my *Gratitude Program*, and I will respectfully abide by your wish. I sincerely appreciate your time, and please do not ever hesitate to give me a call with any questions. I have also enclosed my most recent newsletter which happens to be one aspect of my *Gratitude Program*. I hope you enjoy it. Thank you!

With gratitude,

Your name

Your company Phone  
number

In addition, I am always looking to serve more people like yourself, so please let me know if you have any friends or family that would benefit from my services. Just simply provide me with the best way to contact them, and I will be happy to see how I can be of service!

## Sample *Stop Over* Ideas

The examples below include both the actual *Stop Over* item and a catchy phrase that you can include in a note or on a business card. It may be a little cheesy, but these *Stop Overs* are fun and people will enjoy your thoughtfulness and creativity. Your clients will also be impressed with your attention and care for them.

### January

- Ice Scraper - "Don't Leave Your Friends and Family in the **Cold**...Refer them to \_\_\_\_\_ (Your Name/Company Name) to buy or sell their home!"

### February

- Chinese New Year - Fortune Cookies - "Having Clients Like You Is My Good **Fortune**"

### March

- St Patrick's Day - Bag of Chocolate Golden Coins - "Your Real Estate Referrals Are **Golden** to Me"

### April

- Garden Trowel and Packet of Seeds - "I **Dig** Your Real Estate Referrals"

### May

- Mother's Day - Potted Flowers - "Your Referrals Make My Business **Bloom**"

### June

- Father's Day - Golf Balls/Tees - "Thank You **'Fore'** Your Referrals"
- Father's Day - Grill Spatula - "I **Flip** for Your Referrals"

### July

- 4<sup>th</sup> of July - Apple Pie - "Your Real Estate Referrals Are the **Apple** of My Eye"
- 4<sup>th</sup> of July - Box of Sparklers - "Your Referrals Make My Business **Sparkle**"

### August

- Inflatable Beach Ball - "Life's a **Beach** with Clients Like You"

September

- Pizza Cutter and Pizza Restaurant Coupon or Gift Certificate - "I Love Your Real Estate Referrals - Any Way You **Slice** It"

October

- Halloween - Halloween Flashlight - "With \_\_\_\_\_ ( Your Name/Company Name)You'll Never Be Left in the **Dark**"

November

- Thanksgiving - Pie Server and Recipe for a Homemade Pumpkin Pie - "I Am Always Available to **Serve** Any of Your Real Estate Needs"

December

- Holiday Music CD - "Your Referrals Are **Music** to My Ears"

## Birthday Card Language

### Husband:

*I hope you have a very Happy Birthday! May it be the beginning of a wonderful year where all your dreams come true.*

*"You are never too old to set another goal or to dream a new dream"*  
- Les Brown

*Happy Birthday!*

*(Your name)*

### Wife:

*I hope your birthday is the start of a year that brings all the joys that life has to offer and that all your dreams come true.*

*"Don't just count your years, make your years count"*  
- Ernest Myers

*Happy Birthday!*

*(Your name)*

### Kids:

*I hope your birthday is packed with BIG surprises and lots of fun! Enjoy this great day and have fun.*

*Happy Birthday!*

*(Your name)*

## Change of Address Postcard Example

### Front Example

*We've Moved!*



*Mike, Lindsey, & Kateland*

### Back Example

The Smith Family  
Address  
Phone Number

Place  
Stamp  
Here

Just a note to let you know  
that we have moved!

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The photo of our home is courtesy  
of our Realtor  
Your Name



# Home Buying Plan For *Client's Name*

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## **Home Description**

### *Needs*

- Price - (price range that was discussed)
- Bedrooms and Baths - (list the minimum number of bedrooms and baths)
- Location - (list the areas they would like to live)
- Square feet - (list range or minimum)
- Lot - (list their preferred lot characteristics)
- Garage - (list garage preferences)

### *Wants*

- (list all the items they would prefer but don't need)

## **Time Frame**

- (list base case scenario or required moving time frame)

## **Pre-Approval Amount**

- (list pre-approval amount or write "to be determined")

**Viewings** (just list the plan for how often and when you will search for homes, reiterate conducting effective searches information listed below)

- Home Buyer's internet watch
- Viewing as often as schedule permits
- Buyer pre-viewing

## **Game Plan**

(Write a brief paragraph summing everything up that was discussed including their Wants and Needs and how they liked to be served. Include anything else that is relevant in order to convey you heard what they need to accomplish and how you can best serve them).

## Home Rating System

**Rating: 1 2 3 4 5 6 7 8 9 10**

**Preferred**

**Features:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Notes:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# 25 Day Listing Feedback Questionnaire

We would appreciate it if you would take a few minutes to fill out an evaluation regarding our service thus far.

- |   |      |      |      |           |           |
|---|------|------|------|-----------|-----------|
| 1. Do you feel the listing process was explained effectively?               | Poor | Fair | Good | Very Good | Excellent |
| 2. How would you rate ( <i>Insert Company Name</i> ) marketing program?     | Poor | Fair | Good | Very Good | Excellent |
| 3. Please rate ( <i>Insert Company Name</i> ) overall accessibility to you? | Poor | Fair | Good | Very Good | Excellent |
| 4. How would you rate ( <i>Insert Company Name</i> ) professionalism?       | Poor | Fair | Good | Very Good | Excellent |
| 5. How effective do you feel the communication has been?                    | Poor | Fair | Good | Very Good | Excellent |
| 6. How well is ( <i>Insert Name</i> ) following the devised game plan?      | Poor | Fair | Good | Very Good | Excellent |

7. What areas do you feel (*Insert Company Name*) could improve? \_\_\_\_\_

8. What would you like to be done differently? \_\_\_\_\_

9. What concerns, if any, do you have about the progress of this transaction? \_\_\_\_\_

10. Has the literature that has been provided to you regarding the listing process been helpful? Please explain. \_\_\_\_\_

11. What are you most pleased with thus far? \_\_\_\_\_

*Thank you for your time. This questionnaire will enable us to make sure we are doing everything possible to serve your needs to the best of our ability.*

*We will be following up to discuss this feedback soon. Please let us know if you have come across any friends or family members who are in need of our services. Thank you!*