



### Prospecting System Check Points:

1. Where is my call lists?
  - a. Prepped day before?
2. How do I pick my call lists?
  - a. Systems for variety
  - b. Systems for consistency
3. Call Routine (what do you need to set yourself up for this routine):
  - a. Coffee
  - b. Bathroom break
  - c. Set my space to be positive
  - d. Set my space to be impenetrable
  - e. Meditate
  - f. Affirmations
  - g. Set up script book especially qualification script (have out? Or review?)
  - h. Set up tracking tool (what do you mean by this?)
  - i. Self-play script
  - j. Get one yes before you start
  - k. Start with Lead Gen List
  - l. Start on time (blocked into the schedule)
  - m. Start dialing at the top of list and don't stop until an hour is up
  - n. Break
  - o. Start again with cultivation list and repeat steps
  - p. Break
  - q. Start again with Database Management list
4. Enter data or send data to assistant/va to enter data
  - a. Data Entry Process
    - i. Name, Phone, Email, Address, Additional Info, Tags, Notes
    - ii. Task set
    - iii. Campaigns/Touch system engaged
5. Journal victories, what worked, what didn't, and what's next.

### Appointment System Check Points:

1. Qualifications:
  - a. Where are you going?
  - b. When do you need to be there?
  - c. What are the reasons for this move?
  - d. (Identify DISC)
2. Set the appointment:
  - a. How do I see my calendar and where am I available?
    - i. Is there a tech that can do this for me like Calendly or Outlook



- b. Where is the appointment going to be set?
        - i. Office
        - ii. Home
        - iii. Starbucks
  3. What do I need to bring with me for this appointment to be successful?
    - a. Collateral
    - b. Flyers
    - c. Leave Behinds or Gifts
    - d. Agreements
    - e. Contracts
    - f. CMA or the like
  4. When I arrive:
    - a. Office
      - i. Conference room set with all materials
      - ii. Greet or have front desk ready to greet by name
      - iii. Ask if they would like refreshments
      - iv. Before entering the room give basic set up of office so they don't have ask where the restroom is
      - v. Set up and test any technology to be used
      - vi. Be prepared with objects for any children to be entertained
    - b. Home
      - i. Ring/knock
      - ii. Step back
      - iii. Greet with a smile
      - iv. Ask permission to enter
      - v. Sit at the kitchen table
      - vi. Give them survey or something to begin filling out so you can tour the home
    - c. Starbucks
      - i. Research their face through social media
      - ii. Enter and look for the client
        1. If not present: sit at a prominent location in view of all entry points
        2. If present: approach with a smile and greet by name
      - iii. Ask if they would like a beverage
        1. If yes walk with them to small talk in line
        2. If no invite them to sit
  5. Presentation:
    - a. Remember W.A.I.T: Why Am I Talking
    - b. Remember tool of rapport
    - c. Ask questions



- d. Identify learning style
- 6. Call to action:
  - a. Signed Agreement
  - b. Next Steps
  - c. Communication preferences
  - d. When will they hear from you next?
- 7. Salutations:
  - a. It's been an honor.
- 8. Notes Entered
  - a. 15 minute buffer at end of each appointment to enter notes

### Agreement System:

- 1. Agreement Signed
  - a. Bring paper agreement to each meeting
  - b. Require agreement before showing a buyer transaction
- 2. Next Step Buyer (1)
  - a. Portals for searches set
  - b. Showing system explained
  - c. Showing availability explained
  - d. Contracting system explained
  - e. Process for scheduling homes
  - f. Process for showing homes
  - g. Process for showing feedback to seller agent
  - h. Process for showing feedback from client
  - i. Close to next appointment
  - j. If perfect home: process for contracting immediately
  - k. Process for writing contracted
- 3. Next Step Seller (1)
  - a. Declutter
  - b. MLS process
  - c. Photos
  - d. Collateral
  - e. Open house procedures
  - f. Signs
  - g. Keys
  - h. Lockbox
  - i. Stager

### Contracted System:

- 1. Making offers
  - a. System and Process for writing contracts



- i. CMA
  - ii. Necessary Addendum
  - iii. Signatures system (e sig and wt sig)
2. Receiving offers
  - a. System and process for receiving offers
  - b. System and process for delivering offers
3. Negotiations Process and Procedures
4. Accepted contract
  - a. Execution process
  - b. Delivery of checks
  - c. Compliance Set up
5. Next step buyers (2)
  - a. Highly detailed email about all next steps
  - b. Attached contract
6. Next step sellers (2)
  - a. Highly detailed email about all next steps
  - b. Attached contract
7. Check Points Calendared
  - a. Earnest money
  - b. Option
  - c. Appraisal
  - d. Financing Addendum
  - e. Final Walk through
  - f. Closing
  - g.
8. Transaction Movement Tracked (CRM, Trello, etc...)
9. Final Steps (Buyer)
  - a. What to do
  - b. What not to do

### Closing System:

1. Date Set
2. Walk through
  - a. Walk through document
  - b. Keys process
  - c. Signs process
  - d. Lock box process
  - e. Move in/move out verified
  - f. If lease back...terms and checks exchanged
3. Gift Process



4. Survey of transaction for reviews
5. Referral
6. Campaign for continued cultivation and customer relations