The Perfect
Real Estate Assistant

Session 17

Assistant Session

Customer Experience

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Session 17—Assistant Session: Customer Experience

Objectives for Today's Session

1. Analyze your customer experience
2. Setting expectations
3. MMFI
4. Create a raving fan
5. Learn about client events
6. Making the most of Referrals

Guidelines for this course:

1. Join MAPS on Facebook to stay up to date on all MAPS events and programs: https://www.facebook.com/mapscoaching
2. Only paid participants may listen and contribute.
3. To ask a question or make a comment, please use the chat box
4. If you would like to speak, please wait until the instructor opens comments towards the end of the session.
5. Complete all assignments prior to the session.
6. Be PREPARED!

Agenda for Today's Session

Get Ready!

Complete the questions on this page as a warm-up to prepare for your coaching call.

How would you rate your customer experience?

____

What is your repeat and referral percentage?

____

What should your repeat and referral percentage be each year?

____

What is the value of each client?

____

What is a client worth over the next 5 years?

____

Notes:

____

____

____

____

____

____

CUSTOMER SERVICE IN CHALLENGING TIMES

Whether it's COVID-19, a natural disaster, a local emergency or even challenging economic times, it is important to have a communication plan in place for your clients during times of crisis. Make sure your plan is "all-inclusive" meaning that it must include your website, social media, and your various systems.

1. **Show that your team cares.** Send a message to your customers to show you're aware of what is happening and are taking action to help. Ask if you can assist them in any way and let them know you will be sending them a list of local resources. Use social media, email, call or text them to get your message out.
2. **Be proactive in your communications.** Your customers count on you even more than usual during a crisis. Connect with your clients frequently... proactive communication will free up your staff. For your database, create communication that is appropriate for a variety of communication channels including email, social media, your website homepage, headers, or a dedicated landing page designed to inform customers about what is happening in your business. Proactively announce changes or impacts to your business. Do not make customers hunt for the information they need – instead, bring it to them.
3. **Be an Inspiration**. Do all you can to help. Share a donor link, assist with collection coordination; donate products, services, money, or time. People are looking for ways to help so be sure to communicate with your team and the community how they can get involved.
4. **Audit your content.** Review the content of your entire messaging stream, including social media as well as promotional and transactional emails to identify communications that need to pause or shift as a result of the situation. Do this to ensure that your team's message does not come off as insensitive, incorrect, or seeking to capitalize on the situation.

The $24,000 Lesson

Below is a copy of an email an agent Monica coached (San Diego, CA), sent to his team. This illustrates the importance of customer experience and what may happen when a client's expectations are not met.

Team,

We had a seller cancel after being listed with us for one week, and there was not one thing they said that I did not disagree with. I'm embarrassed, disappointed, and not happy.

Just so we are clear (most of you have heard this before) when a client hires us, they have done so because they want the best! And they expect just that. Their expectations are extremely high and rightfully so. At that point their confidence is at its highest, and our job is to keep it there by doing what we say we do and communicating often and clearly. You see, a little thing like a sign not showing up when they were told it would be there causes them to question whether we are too busy or whether they are important to us. It is just a sign to us, yet to them EVERYTHING IS A BIG DEAL. This process of selling is the biggest thing going on in their lives!!! We need to treat it that way. When our sales partners don't go see their home within 5 days like they were told, their confidence in us goes down. When the write up or photos are not world class, we lose credibility. When the client sends an email to the entire team with information that is important to them and us, and **not a single person** has the common courtesy or common sense to reply, what does it say? I know this—it doesn't scream **"you are important, we care about you; you chose the right agency!"**

I hope that every person reading this is bothered by it, because if not then you should be looking at whether you are up to being on the best team in San Diego. Please be honest with yourself and with me. If you are who I think you are, then take this as a valuable lesson (because we just paid $24,000 for it) and learn and realize how important the **Customer Experience** is.

So that we can all focus, learn, and remember, I want each of you to take a minute and reply to this email with a sentence or two on what your definition of **Customer Experience** is or should look like for our team. Thank you for looking!

Signed,

Your Agent

$24,000 Mistake Part 2

At Least $24,000 and Growing Daily

I was coaching Chris when he sent me a copy of the $24,000 Mistake. Since you just read that...let's read this and talk.

Is this the world class real estate team we discussed building at our year-end meeting in November? If you are in the right place and on the right team ...I know you will have the answers.

On September 15th, Saturday afternoon ...Charlie, Aaron, Marc Prestera and I spent one and a half hours...90 excruciating minutes with a past client. All I could say was..."I apologize…you are right...I apologize…you are right."

We sold Marty and Sue's home and sold them another simultaneously…. $24,000 in commission…of which they reminded me several times at the meeting.

They brought their computer...and had a detailed list of mistakes and mishandling of their file and ultimately their life. Each mistake was dated and they had total recall.

Our Real Estate Team caused great stress and great pain. They have bought and sold over 9 homes and they have never had such a horrible experience.

This is their perception. It is the correct perception. Again, their perception is correct. If you disagree, then you are not understanding the definition of a **world class real estate team** that delivers over the top customer service.

Here is a sample:

1. The closing dates did not match on the contract … sale of their home and purchase. We did not catch it for over 3 weeks. It does not matter "how" and "who" on this point....it was not caught. What is the solution?

2. They referred to the listing agent on the property they were buying and were corrected by a staff member...Answer from staff: "no, they are not with KW, you are wrong". Sue said..." you should check". Sue was right. How does that make her feel? One, telling her she is wrong, and two, we are in charge of her contract and we don't know the players? Do you know what the correct response should have been?
   Who likes to hear "NO"?

3. Since both are in management, they felt that scanned documents were absolutely ridiculous. How does that represent us? Does anyone remember how I feel about ***SCANNED DOCUMENTS***? I have had many discussions on this and have said repeatedly do not do this without an explanation of why!

It shows lack of:

a. ______________________________

b. ______________________________

(You fill in the blanks)

If we are sloppy about this . . .. what else is sloppy?

4. The closing and closing date mistake were a nightmare. Bottom line...we did not set expectations regarding a simultaneous closing and some of the challenges. They felt they were not important to us and we dropped the ball. Everything was clearly a screw up on our part.

Bottom line … we set no expectations and they were angry about the closing, miscommunication, and non-communication.

What is your solution for this?

a. ______________________________

b. ______________________________

.

They mentioned twice that they have absolutely made sure on two occasions when their friends asked them "should we use this team to sell our home"? ..... They were able to say “NO”. They absolutely did not recommend us ...... and probably did more damage ultimately than just two “Noes’”. What do I mean by this?

How about in the future? Do you think their friends said something to anyone else?

We should be extremely grateful to Marty and Sue. How many clients just say, “Forget it, I will never use them again” ...a few or many?

a. They took the time to share their experience with us.

b. They drove to us.

c. They will help us to create the customer service that every client should expect and receive.

5. They brought me the two “thank you’s” from Chris. They were mailed from Austin and they received quite late. They wondered why their “local” realtor sent mail from Austin and why he was congratulating them 2 months later.
Again, it is the small details that matter.

Aaron and I will be driving over to Marty and Sue’s...at 6 pm on Thursday … Just a short drive probably 90 minutes each way with traffic and then the meeting. Could be another long one...whatever it takes to show we care.

I want you to help me determine:

1. What do we do now to fix this problem?
____

2. How do we earn the right to work with them again?
____

3. How do we earn the right for them to refer us to family and friends? _________________

____

Let's brainstorm these answers:

____

____

P.S. Their parting comment to me.... "We expect to be compensated. What do you think is fair? What do you think they want?"

Question:

1. Are you ready to make some changes?
2. What are those changes specifically?

Obviously, we will be compensating them ......
Are you going to also contribute?

SELLER AND BUYER PERCEPTIONS

SELLER PERCEPTION OF:

"I just listed my house."

1. ____
2. ____
3. ____

SELLER PERCEPTION OF:

"I just signed a contract, so my house is sold."

1. ____
2. ____
3. ____

BUYER PERCEPTION OF:

"My offer just got accepted."

1. ____
2. ____
3. ____

What can you do to change these perceptions?

Team Customer Experience

- ✓ Consider the following customer experience tips.
- ✓ Review and discuss the questions with the team.

Use this process to improve your customer service and take it to a new level.

1. **Excellent customer experiences always start with using a great intentional conversation, practicing it, and answering all the clients' questions truthfully.**
   1. *What do you consider "good" customer experiences?*
   2. *How can you improve?*

2. **Excellent customer experiences require regularly scheduled communication. Call each listing each day for 21 days. The first and last 10 days of an escrow you should call every day.**
   1. *How often do you call your customers during a transaction?*
   2. *What will great communication do for you?*

3. **Use the best affiliates/vendors that you have in your market. Do not settle for anything but the best!**
   1. *How well do you utilize your affiliates?*

4. **Under-promise and over deliver.**
   1. *Have you ever over-promised and under-delivered?*
   2. *What should you be doing?*

5. **Talk to your clients each day, know their personality styles, and know their challenges. They are your clients who expect the best.**
    1. *What do you tell them when you call?*
    2. *Do you get involved in their problems? How do you stay out?*

6. **The client is looking for reliability and dependability.**
    1. *What qualities are your customers looking for?*
    2. *How do you rate yourself on reliability and dependability?*

7. **Give the seller the Plan of Action and have them check the steps off as you do them. Tell them all the steps.**
    1. *Do you use a checklist?*

8. **Do a survey after closing. Send a thank you after you receive the survey...no matter what the comments may have been.**
    1. *Do you survey customers after closing?*
    2. *What do you ask? What is your system?*

9. **Remember customer experience is the foundation of getting repeat and referral business.**
    1. *What do you need to improve?*
    2. *What is your ratio of repeat and referral business?*

10. **Your customers are your only asset.**
    1. *How can you improve your assets?*

Closing Statement Letter

- ✓ Send to Buyer or Orphan Buyer
- ✓ Send to Seller
- ✓ Date Jan 10, 20_ _
- ✓ Prepare letter and envelope after closing / store until Jan 10, 20_

January 10, 20_ _

Dear (BUYER/SELLER),

I KNEW YOU WOULD BE LOOKING FOR THIS!

As part of my continuing customer service, I wanted to provide a copy of your closing statement.

Some of the items are tax deductible. Please check with your accountant/tax -preparer to make sure you declare all your deductions.

I have enclosed my business card for your convenience. Please call if I may be of service.

Respectfully,

(AGENT'S NAME)

Anniversary System Letter

- ✓ This letter is sent on the day of the anniversary of the closing, year after year.
- ✓ There is no end date.
- ✓ This should go out to the buyer and seller, no matter who the agent represented.

Dear (BUYER/SELLER),

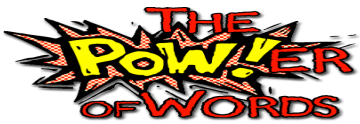
Every year on the anniversary of your transaction with me, I would like to remind you that I am still in the business and 20_ _ was a banner year! Thank you for your support. I am working hard and hoping you will refer me to your family, friends, and co-workers should any of them be in need of the best representation in ________ (city) and the surrounding areas. I will roll out the red carpet!

It has never been a better time to buy, prices are stable, and rates are still at a 60-year low. There are lots of buyers! In fact, I have not seen a more "normal" market in the last _____ (number) years. *(Note: this paragraph is just an example – you will need to modify it to reflect the current market information as appropriate.)*

Thank you for the privilege of helping you with your real estate needs and questions. I have enclosed my business card for your convenience. Please do not hesitate to call.

Sincerely,

(AGENT'S NAME)



.... Important Words in Customer Experience

The 10 most important words in Customer Experiences:

"I apologize for our mistake. Let us make it right."
When something goes wrong, most people merely want to be heard and acknowledged. So, listen, apologize, and then ask what you can do to make it right.

The 9 most important words:

"Thank you for your business. We appreciate your referrals."
Repeat customers cost less than new customers and are often more loyal.

The 8 most important words:

"Let me check and I will find out."
It's ok if you don't know the answer; it's not ok to make the customer keep searching for it. That's your job.

The 7 most important words:

"What else can we do for you?"
Be prepared to go the extra mile, there is less competition there.

The 6 most important words:

"How can we help your day?"
Your customers will be pleasantly surprised when you ask for additional ways to help.

The 5 most important words:

"How may we help you?"
This question reinforces your role in the relationship. Play that role the best you can.

The 4 most important words:

"How did we do?"
Feedback is critical! Your customers have a unique perspective, and they appreciate being asked.

The 3 most important words:

"Glad you called!"
Customers who feel welcome spend more time, more money and are more likely to return.

The 2 most important words:

"Thank you."
Basic manners... but how often do you get thanked when you're the customer?

The MOST important word:

"Yes."
Become a yes person.

Critique Your Customer Experience

These are great points to go over regarding the customer's experience and how to improve/increase repeat and referral business. Schedule this review on a quarterly basis. Customize 6-10 for your team.

1. What is your "customer for life" plan?
2. Do you have a scheduled marketing plan for this year?
3. How many are currently in your database?
4. Minimum 10,000.
5. Add three completes to the database everyday
6.
7.
8.
9.
10.

Action Plan

1. 10,000 clients/COI in database.
2. Posted scripts that support customer service.
3. Identify client's personality type.
4. White board/screen of current clients posted.

Monica's Disneyland Close

Thank you for working with the ____________ team—we really appreciate your business! Is there anything else we can do to help you today?

HOW TO CREATE A CUSTOMER EXPERIENCE " LAB"

How can you learn more about your customers, figure out what they need and get the team involved? You might want to try a customer experience lab.

- **Enhanced customer insight:** Helps predict what individual customers need and want during the home-buying process
- **Customer involvement:** This is about personalizing the experience and not delivering a one-size-fits-all to customers.
- **Employee involvement:** Have a greater involvement by team members in the processes of creating and delivering different customer touch points

Define the experience:

1. What is the purpose?

2. Why do you want to do this on a regular basis?

3. Where will you hold the "LAB?"

4.How do you incorporate the information?

5. How do you let the participants / clients know you incorporated their suggestions?

Suggestions for a great "Lab":

* In your office

* In a designated room / restaurant

*Have questions ready

* Have a thank you gift

* Send thank you note after

* Follow up call after

QUESTIONS FOR YOUR LAB PARTICIPANTS:

1. What do you want in a “Realtor for Life”?

2 What services would you expect from an agent who is your “Realtor for Life”?

3. What value do you feel you receive from our team?

4. What value do you feel you are not receiving from our team?

5.If you could create a real estate agent customer service experience to be a 10 on a 1-10 scale, what would that look like?

6. What are your suggestions for my team to receive more referrals from clients.

7. What is your idea of a great client appreciation party that you would definitely attend.?

WARNING!

The Telephone Consumer Protection Act (TCPA) regulates calls and text messages made using certain technologies. The TCPA includes the National Do Not Call Registry and also regulates telemarketing calls. Real estate agents who violate these laws face stiff regulatory penalties and/or potentially catastrophic legal damages. Contact an attorney to determine if your practices follow TCPA guidelines. In addition to federal laws, several states have laws governing telemarketing. Consult an attorney to determine applicable laws in your area.

Customer Marketing Plan (36 Touch)

26 emails

4 hard mailings (1 per quarter)

4 phone calls (1 per quarter)

2 live events

Be sure to connect on social media as well

Top 25 List

GET REFERRALS WITH GREAT CLIENT EVENTS

A great way to reconnect with past clients and prospect your database is by hosting past client events and parties!

When planning past client events, remember to always come from a place of authenticity and generosity.

Here are some great ideas to get your past client event planning started!

- **Housewarming Parties** – When your clients close on their home, offer to host a housewarming for them and supply the food and beverages. This will show your appreciation for your clients as well as make an impact on their guests.
- **Holiday Pie Party** – Host a holiday pie party at your office and invite past clients to come by, with a friend or two, for a slice of pie. Seychelle Van Poole of Van Poole Properties has had great success with this!

  "We invite our clients to the office to pick up a pie or Bundt cake they can take to their Thanksgiving meal. The first year we did it, we gave away 50 and received seven referrals. Last year we gave away 450 and received 15 referrals as a result," she said.
- **Movie Night** – Rent a theater and invite past clients to attend the show – bringing a donation to a local charity as their "admission ticket." The donations could include books, toys or canned food supplies that are in need in your community.

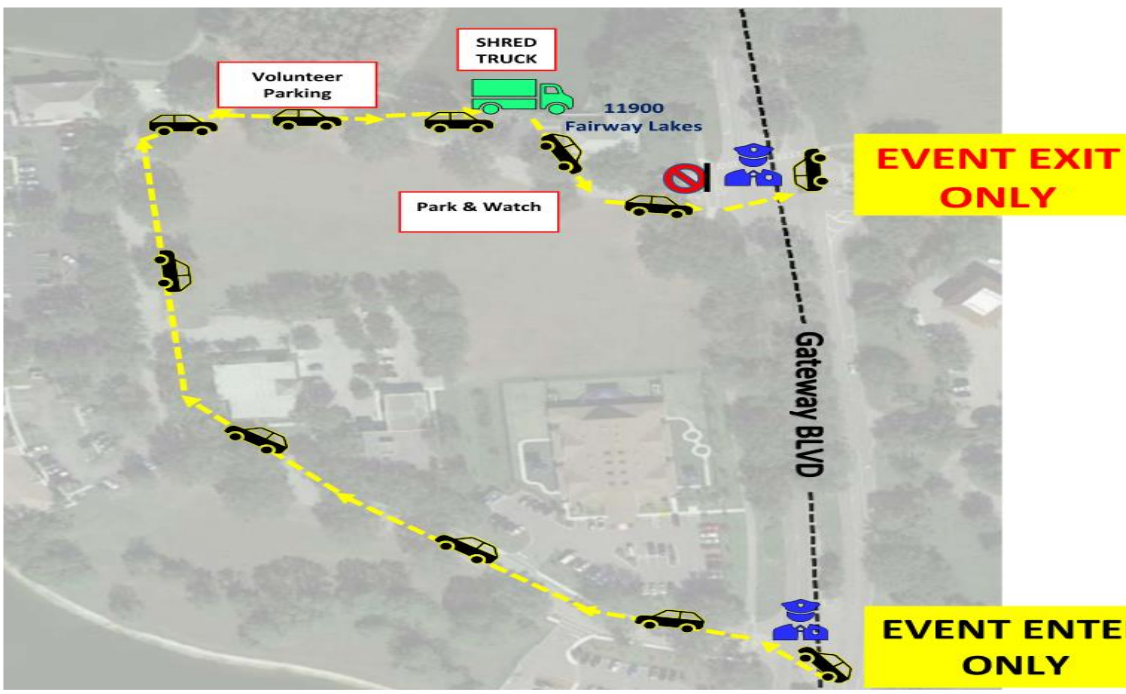
Other fun client event ideas include:

1. **Food and Beverage Tastings**: Bring in some local products and set out tastings. This is a great way to invite local businesses that may donate a portion of the items being sampled since there is a business benefit in it for them as well.
2. **Charity Golf Event**: Host a golf tournament at a local golf course benefiting a charity of your choice. You can involve other local businesses for swag-bag item donations.
3. **Host a Home Improvement Class**: Have a local contractor teach a class on basic home improvement ideas and show participants how to do things like property paint trim, re-grout tile, change a faucet, etc.
4. **Take Them Out to the Ballgam**e: Purchase a block of seats at a sporting event and invite clients to come out and mingle with you and your team for a fun family

event. During the game, you may even have a chance to strike up a conversation about their future home buying or selling plans.

5. **Host a Property Management Class**: To excite your clients about the possibilities of purchasing a second investment rental home, have a class on the basics of property management. As a bonus for the first 10 attendees, you can give away a free copy of the KW book *HOLD*.
6. **Document Shredding Day**: Invite clients to your office and have them bring a box of their old documents that need to be shredded. Offer the shredding service free. You can hire a shredding company to drop off a secured bin, and while clients are depositing items in the bin, have a conversation with them about their future plans.
7. **First-Time Home Buyer Lunch and Learn**: Ask your clients if they know anyone who may be purchasing a home for the first time and invite them to your free lunch and learn. In the class, you can give away a free copy of the KW book *Your First Home*. In the book, make sure to write your contact information so they know to call you when they are ready.
8. **Free LED Lightbulb Day:** On the next Earth Day (April 22), tell clients to come by for a free LED lightbulb. On the box, make sure to put your contact information. You can also raffle off copies of the KW book *Green Your Home*.
9. **Celebrate National _____ Day**: Keep a calendar of fun, silly holidays and schedule an event in your office around them. You could have an ice cream social on National Ice Cream Day (third Sunday in July) or a taco bar on National Taco Day (Oct. 4).
10. **Bring the Party to Them**: Select a client at random and bring them lunch! You could center this around a Facebook Live event where for one week you invite clients to enter with a chance at a free lunch for their office. Then, draw the name in a live video.
11. **Photo/Breakfast with Santa:** Have fun holiday activities for the kids, donuts, and a professional photographer. Think about adding chance to win a 2 night stay at a resort through a raffle for an additional referral.


2020 SHRED THE DAY
PRESENTED BY
Denny Grimes Team
KW FORT MYERS & THE ISLANDS
KELLERWILLIAMS. REALTY
MOVEMENT MORTGAGE
JACK PANKOW Attorney At Law
A DRIVE THRU EVENT
Shred your documents
@ our place
FREE
Saturday, July 18th
10am to 2pm
AT THE GATEWAY SALES AND INFORMATION CENTER
11900 FAIRWAY LAKES DRIVE, FORT MYERS, FL 33913
*Residential/Personal documents only. Not for Commercial/Business use.


SHRED TRUCK
Volunteer Parking
11900 Fairway Lakes
Park & Watch
EVENT EXIT ONLY
Gateway BLVD
EVENT ENTER ONLY

PIE GIVEAWAY SYSTEM

Holding a Pie Giveaway Day is a great way to thank past and current clients. It's about cultivating relationships with the people in your database as well as generating leads. The earlier you begin planning, the more successful your event will be. You should begin planning no later than 30 days in advance. You can decide how elaborate you want your pie day to be, but most agents plan for a certain number of hours on a particular day, or days, inviting recipients to pick up their pie at their convenience. You can choose a walk-up event or even a drive thru event, but planning is key. Create a spreadsheet from the responses so you will know how many clients you can expect, what kind of pie they want, how they heard about the giveaway, etc.

Tips for Success:

- Let your client know about your celebration by inviting them multiple ways to ensure a good turnout. You can invite them by calling your database, through social media, sending personalized e-vites, using your website or even custom printed invitations or flyers.

- Use the opportunity to garner reviews or testimonials from your clients. Offer a can of whip cream for a review.

- Offer an extra gift such as a bottle of wine or $25. Gift card for each referral the client brings.

- Join forces with a local bakery. The bakery can share the cost with you while marketing their business. Contact bakeries in your area in advance to see who would be willing to work with you.

- You may also choose to have printed marketing materials so attendees of your event will have something to take home and share with their sphere of influence.

- Be sure to take pictures during your event so you can use those images for next year's promotion.

- Take notes about what worked, and lessons learned to ensure an even more successful event next time around.

- There's a good chance you'll end up with extra pies. Arrange ahead of time to donate leftovers to a local shelter or to people in need.

Sample Invitations

As our way of saying "Thank You" for entrusting us to help you with the biggest financial decision of your life – home ownership, we would like to show our appreciation for you and your family by providing you with dessert this holiday season.

As a valued client of KW, we wanted to personally invite you to our upcoming Client Appreciation Thanksgiving Pie Pick-up event on Tuesday, November 21st from 9:00 am – 7:00 pm, at our office, 123 Main St., Anytown. Feel free to drop in at any time during the day to pick-up a pie for your Thanksgiving Feast.

Call _______________ to reserve your pie today!

Looking forward to seeing you this holiday season!

Thanksgiving is just around the corner. I want to celebrate YOU by thanking you with a Pie! Please contact me via phone or text at (000) 000-0000 or by email at ______________ to RSVP and reserve your free pie. The event will look a bit different this year because safety is a top priority. At this time, the event will be a drive-through ONLY. I am looking forward to seeing you. Bring a referral for someone we can help with their Real Estate needs or a great review and get a can of whip cream to go with your pie!

It's that time of year again…the fabulous pie give-away CURBSIDE! Here is a link to all the details on how to order your free holiday pie. (Insert link) It's our way of saying thank you for your support of our Real Estate Team. Be sure to order by (date).

Pick up will be Monday November 23rd from 3-6pm at the Keller Williams building. COVID-19 safety guidelines will be implemented. Tag us in a picture with your pie, write us a 5-star review or give us a referral, and you will be entered in a raffle for some great gift baskets! See you curbside!

(We had several vendors donate gift baskets and gift cards.)

Keeping Track (sample excel chart)

Date	Timestamp	First Name	Last Name	Pie - Pumpkin/Apple? (Choose 1)	How Did You Hear About the Event?	Agent who Invited You
10/16/2020	10/16/2020 7:47:48	John	Smith	Pumpkin Pie	Social Media	Jane Doe
10/18/2020	10/18/2020 13:49:59			Pumpkin Pie	monicareynolds.com website	
10/18/2020	10/18/2020 15:26:43			Pumpkin Pie	Agent Call	
10/18/2020	10/18/2020 15:31:21			Pumpkin Pie	Agent Call	
10/18/2020	10/18/2020 15:49:09			Pumpkin Pie	Agent Call	
10/18/2020	10/18/2020 15:52:23			Pumpkin Pie	Agent Call	
10/18/2020	10/18/2020 22:51:05			Apple Pie	Agent Call	
10/19/2020	10/19/2020 9:12:34			Pumpkin Pie	Agent Call	
10/19/2020	10/19/2020 11:54:37			Pumpkin Pie	monicareynolds.com website	
10/19/2020	10/19/2020 12:12:51			Pumpkin Pie	Agent Call	
10/19/2020	10/19/2020 14:35:49			Apple Pie	Agent Call	
10/19/2020	10/19/2020 16:10:04			Pumpkin Pie	Agent Call	
10/19/2020	10/19/2020 16:42:02			Apple Pie	Agent Call	
10/19/2020	10/19/2020 17:32:44			Pumpkin Pie	Agent Call	
10/19/2020	10/19/2020 18:17:18			Pumpkin Pie	Agent Call	
10/20/2020	10/20/2020 10:08:30			Apple Pie	Agent	
10/20/2020	10/20/2020 10:12:57			Apple Pie	Agent	
10/20/2020	10/20/2020 10:17:07			Apple Pie	Agent	

How did you hear about the event?	Number of Responses
Agent Call	90
Postcard	79
Email	68
Team website	21
Social Media	12
Monthly Newsletter	10
Past client	9

Flyer Example

The Great Thanksgiving Pie Giveaway

As a valued client of The Best Group of KW we wanted to personally invite you to our upcoming Client Appreciation Thanksgiving Pie Pick-up event on Tuesday, November 21st from 9:00 am – 7:00 pm, at our office, 123 W Cherry Ave USA!

These pies are completely complimentary!

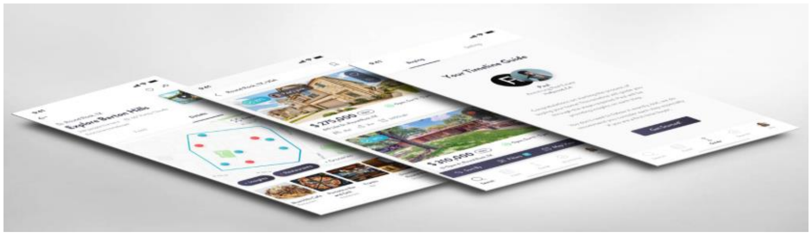
Click the green "Register" button below to reserve your pie today

REGISTER

WARNING!

The Telephone Consumer Protection Act (TCPA) regulates calls and text messages made using certain technologies. The TCPA includes the National Do Not Call Registry and also regulates telemarketing calls. Real estate agents who violate these laws face stiff regulatory penalties and/or potentially catastrophic legal damages. Contact an attorney to determine if your practices follow TCPA guidelines. In addition to federal laws, several states have laws governing telemarketing. Consult an attorney to determine applicable laws in your area.

Command/Consumer Experience
Get Started with the KW App



The app is the consumer-facing counterpart to Command. The new technology creates a central point for communication and collaboration. Agents receive greater insights into buyer and seller preferences and activity – delivered directly to the Command dashboard. To launch your personalized app, go to your Consumer portal.

Here are some of the great things the app can do for you*

Get Started
The KW App Kelle Guide will have everything you need to get started with your new KW App. It will start by ensuring that you download the new KW App, then it will have you customize your Consumer Guide, finally it will allow you to launch the KW App Promotion SmartPlan. You are also able to access your KW App URL and Text Code in Command, which you can use to download and share your app.

Customize Your Consumer Experience
Once you complete the KW App Kelle Guide, you are still able to customize your Consumer Guide at any time. Keep in mind that you will also need to complete your Marketing Profile, in Command Settings. This profile is what pushes your information into the KW App.

Launch Your KW App Marketing
You now have the ability to launch a SmartPlan to promote your new KW App to your leads and contacts. You also have the ability to launch a social video quick post featuring the KW App commercial, and to create customizable social designs to use when sending social ads or posts in Campaigns.

Manage Your Client Relationships
As your client's progress through the Consumer Guide you are able keep track of which step they are at through Command. You can also track their activity on your KW App and Site through their contact record in Command as well.

*KW Answers

Client Referral System

1. Agent to call client who sent referral to personally say thank you!

2. Send flowers to the office of the client who sent referral immediately following the call.
    a. Negotiate with flower shop a great deal on bouquets.
    b. Pre-sign cards and leave with flower shop.

3. After closing, send thank you note to client who sent referral.

4. Add client to
    a. Someone who sent you a referral and it closed.
    b. Someone who should send you referrals.
    c. Someone you have had multiple deals with, in your career.
    d. Recognize by client party, customer service letters, and individual lunch.

5. Invite client to a “client appreciation” party.

6. Send a holiday gift:
    a. Turkey
    b. Calendar
    c. Holiday Basket
    d. ____
    e. ____

Referral Form

Date: ___________________________

Agent's Name: ______________________________

Company: ___________________________

Email: _____________________________________ Phone: ___________________

Address:____

Client's Name:

____

Buyer: yes / no Seller: yes / no

Client's Address:

____

City/State: ________________________________ Referral fee:

Please email this form every Friday by 12:00pm to __________________ (Agent).

Thank you for your cooperation. This insures great customer service.

Email: ____

Comments/ Updates

1. ____
2. ____
3. ____
4. ____
5. ____

Thank you, and please call if we can be of any help!!!
Sincerely,
(AGENT'S NAME)

ASK FOR IT.

ASK FOR A REFERRAL WHENEVER THERE IS A POSITIVE INTERACTION

CONVERSATION:

“Thank you for working with our team. We so appreciate your business. May I ask you a favor? Our business is based on working with great people like you…who do you know that is thinking of buying or selling? Thank you for thinking about that today.”

ASK 100 PEOPLE A MONTH FOR A REFERRAL

CONVERSATION:

By the way, we need another great client like you -- who do you know that needs to buy or sell a house in the next 30 days?

UPDATING YOUR DATABASE INFORMATION

CONVERSATION:

Good Morning. As part of ___________ (agent’s name) customer service...she/he asked that I call and verify our records. Is your phone number.............. and is your address still.................? Great.
Also, what is your email address? Great. As part of __________ (agent’s name) customer service we will once a quarter send out a very short and informational market update regarding the value of your home.

Thank you for taking the time and also...our business is based on referrals...do you know anyone who is thinking about buying or selling? Great! Thanks for thinking about that...Have a great day and let’s talk again soon!”

OUR PROMISE AND GOALS TO YOU

“Did (agent) talk to you about our team’s Promise to You? I am checking with you to see if you thought of someone we could help.

1. “Our team has this Promise and Goal to create an experience you honestly cannot imagine being better.”

2. “Our systems, and everything we do, are designed around delivering on this Promise and Goal.”

3. “Everyone on our team is *focused* on what it is you want and what it is you need in order to achieve your goal.”

4. “We make every effort to be proactive on everything in the sale process and to eliminate the surprises and keep it as good as it can be.”

5. “Now there will be challenges, we know there will be, it's real estate and it’s people!”

6. “Just know that our team is focused on creating a 1O+ experience for you.”

“So, *another* goal we have is that some time from right now until the day we close on your home.... that you will feel so great about what we are doing for you, that you will call us......text us......or email us with the name of someone that needs help in real estate. They might just have a general question, they might need to buy or sell a home, they might need to refinance; they just need help with real estate.”

“While we are working together you will hopefully be giving our name out which we truly, truly appreciate ...word of mouth is our lifeblood…. May we ask you to do that?”

ASKING FOR CUSTOMER REVIEWS ON SOCIAL MEDIA WEBSITES

Good Morning!

Thank you for working with our team and for recognizing our teamwork. It is our privilege to work with you. As you may know our business is built by referrals from great clients like yourself and reviews are an important part of our business. May I ask you to take a few moments to give us a review on _________? I would like to send you an email with a link to the website that you can just click and review.

Thank you very much.

Additional option:
For your time, _______________ (agent) would like to send you a Starbucks card for a couple of cups of coffee. Thank you and I am sending you the link now.

Tip: It does not matter where in the listing or pending process you are in…ask for referral…timing is everything.

TRACK AND MANAGE REFERRALS IN COMMAND

In Command you can seamlessly send, track, and receive referrals all in one place.
To learn how to track and manage your referrals, follow the steps below:

My Referrals

1 Through the My Referrals page, you can find every referral you have ever sent or received. By default, you will see Pending referrals (or Active referrals, but you can click on the various statuses, to view other referrals. You can select any combination of statuses to view, and the name of the status will be highlighted in teal, if it is selected:

2 In addition to the status filters, you can use the Filters button to narrow down you list by specific criteria: Client type, Referral Type, Client Details, Referral Fee and Property Price Range.

3 Use the drop-downs, on either the sent or received columns to sort your referrals by specific criteria: newest, oldest, price range (high to low), and price range (low to high).

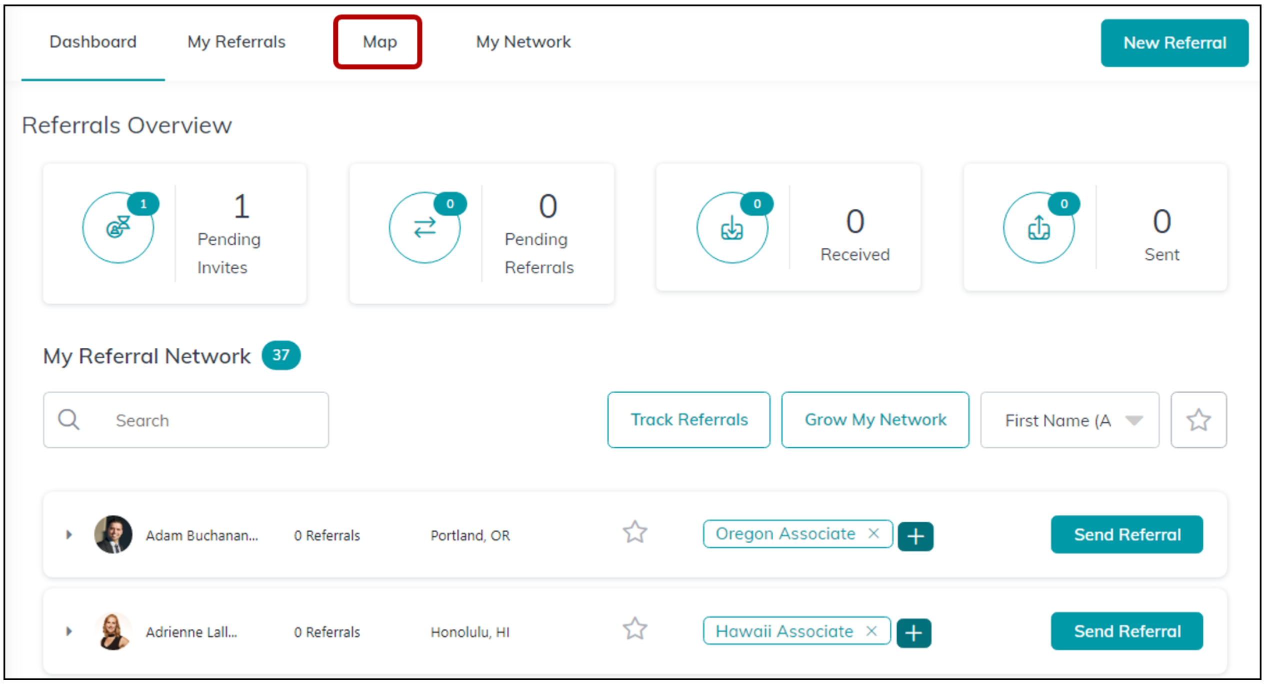
4 When you receive a referral, you will have 1 – 96 hours to respond, depending on how they set up the Referral Request. Every pending referral will have a countdown timer, based on the Acceptance Deadline. You have the option to Accept or Reject the offer, and the system will give you other options as well.

5 We now have the ability to track the progress of the Opportunity for all of our referrals. Once you accept a referral, you will be prompted to create an Opportunity for the transaction. The agent who sent the referral will receive email notifications, every time the Opportunity moves to a different Opportunity Phase, and you can track the progress through My Referrals as well.

6 Whether you are the sending or receiving agent, you can click Send Update to add notes and messages to a referral. You can access these updates by clicking Notes & Updates, on the referral card:

7 Click the Activity Log link on any referral in your Referrals Dashboard to see a time-stamped log of the history and any notes that have been sent.

8 Click the menu button (three dots) on any referral card, to see the actions you can take. These actions will depend on the status and type of referral.



Policy and Procedures Tab Suggestions
1. 2. 3.

What I Learned Today …

____

____

____

____

Session 17: Homework Assignment - Complete and Give To Your Agent

1. ____

2. ____

3. ____