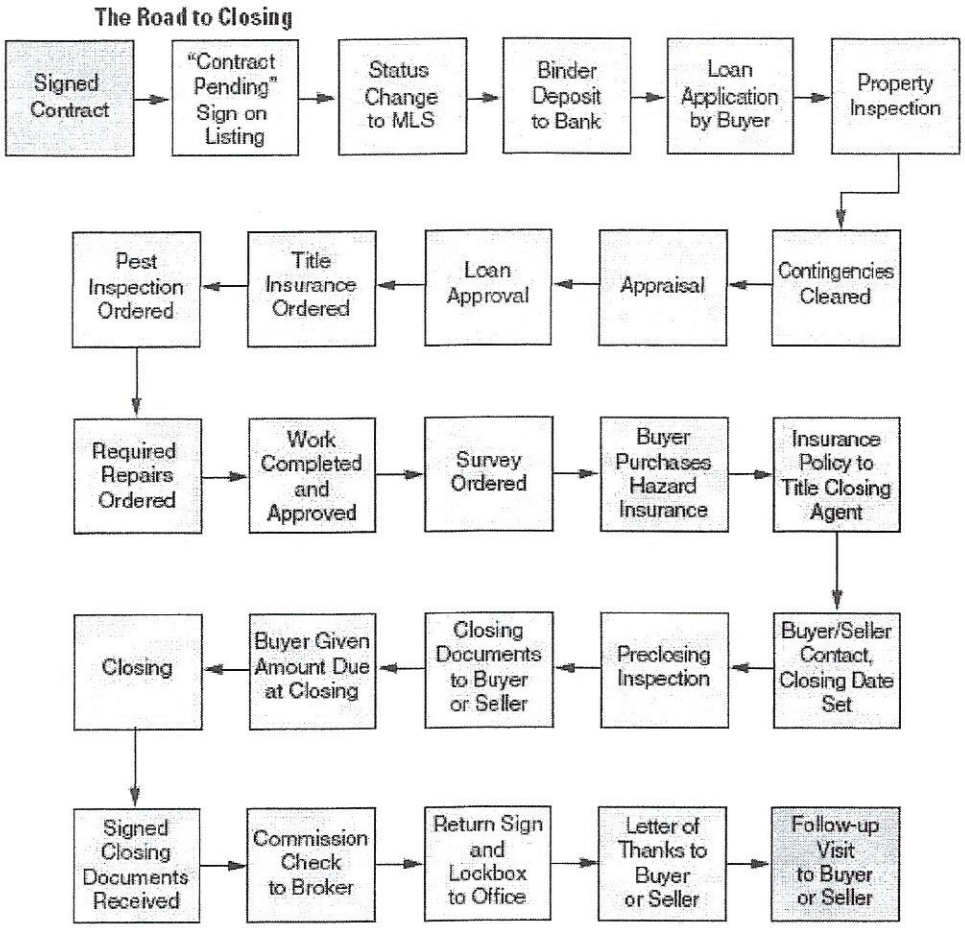
Ten Steps To A Successful Closing

Sales associates can avoid closing problems by following each of these ten steps:

1. Disclose everything to all parties that will affect their decisions before the buyer and seller sign the contract. Surprises after a contract is signed almost certainly will result in one party wanting to get out of the contract.
2. Write the contract carefully and properly explain it to the parties.
3. Recommend that buyers and sellers select lenders and title closing agents who are organized professionals able to meet deadlines.
4. Tell the loan officer and closing agent what the licensee expects in the way of communication and performance.
5. Prepare a Property Sale Information Sheet.
6. Give the closing agent a copy of the prior title insurance policy, if possible.
7. Provide a complete legal description of the property to the closing agent.
8. Ask a lender and title agent to communicate by e-mail, speeding the process while also giving written documentation of the transaction.
9. Use a checklist of duties, such as the Closing Progress Chart.
10. Ask the closing agent to close the buyer's and seller's sides separately to reduce confusion during the closing.



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The Ultimate Memory Jogger

"Build Your Community!"

By Michael J. Maher, MBA

The members of your own family

- ! Father and Mother
- ! Father-In-Law / Mother-In-Law
- ! Grandparents
- ! Children
- ! Brothers & Sisters
- ! Aunts and Uncles
- ! Nieces and Nephews
- ! Cousins

Those you meet in organizations or clubs

- ! Civic groups, Rotary, exchange, Jaycees
- ! Political clubs
- ! Lodge, Elks, Moose, Etc.
- ! Missionary societies, brotherhood groups
- ! Merchants or farm organizations
- ! School groups, boosters, alumni, PTA, etc.

List of acquaintances already available

- ! Christmas card list
- ! Address book
- ! Day timer, planner
- ! List of fellow employees
- ! Church directory

People who are decision makers

- ! Business owners
- ! Human Resources Directors
- ! Office managers

Those who are your closest friends with whom you associate regularly

- ! Friends and Neighbors
- ! People you work with
- ! Church members
- ! Sunday school class members

Those you have been associated with in the past

- ! Schoolmates
- ! Former co-workers
- ! People in your home town
- ! Military cohorts

Those you do business with

- ! Doctor, lawyer, barber, merchants, grocer
- ! Gas station attendant, dry cleaner, postal worker
- ! Beauticians, jewelers, waiters/waitresses

People you know who are in direct sales

- ! Business/office machine salespeople
- ! Insurance sales people
- ! Car salespeople

Who do you know in...

- ! Accounting
- ! Acting
- ! Advertising
- ! Aerobics
- ! Air Force
- ! airline
- ! Alarm Systems
- ! Animal Health/Vet
- ! Antiques
- ! Apartment
- ! Architect
- ! Army
- ! Art
- ! Artificial Nails
- ! Asphalt
- ! Athletics
- ! Auctioneer
- ! Automobile
- ! Baby-Sitters
- ! Banking
- ! Barber
- ! Baseball
- ! Basketball
- ! Beauty salon
- ! Beepers
- ! Bible School
- ! Bicycles
- ! Blinds
- ! Boats
- ! Bond/Stocks
- ! Books
- ! Bookkeeping
- ! Boys Clubs
- ! Broadcasting
- ! Brokers
- ! Builders
- ! Buses
- ! Cable TV
- ! Cameras
- ! Camping
- ! Crafts
- ! Credit Union
- ! Day Care
- ! Delivery
- ! Dentists
- ! Dermatologists
- ! Designers
- ! Doctors
- ! Driving Range
- ! Dry Cleaners
- ! Dry Wall
- ! Education
- ! Electrician
- ! Engineering
- ! Entertainment
- ! Eye Care
- ! Fax Equipment
- ! Farming
- ! Film Industry
- ! Firemen
- ! Fishermen
- ! Florists
- ! Food Service
- ! Furniture
- ! Gardens
- ! Gift Shops
- ! Girls Clubs
- ! Golfing
- ! Government
- ! Graphic Arts
- ! Grocery Stores
- ! Gymnastics
- ! Hair Care
- ! Handicapped
- ! Handyman
- ! Hardware
- ! Health Clubs
- ! Health Ins.
- ! Hearing Aids
- ! Helicopters
- ! Hiking
- ! Horses
- ! Hospitals
- ! Hotels
- ! Hunting
- ! Ice Cream
- ! Ice Skating
- ! Income Tax
- ! Insurance
- ! Investments
- ! Janitor
- ! Jewelry
- ! Judo
- ! Karate
- ! Kindergarten
- ! Leasing
- ! Libraries
- ! Lighting
- ! Livestock
- ! Loans
- ! Luggage
- ! Lumber
- ! Mail
- ! Management
- ! Manufacturing
- ! Mathematics
- ! Mechanics
- ! Mental Health
- ! Miniature Golf
- ! Mobile homes
- ! Mortgages
- ! Motels
- ! Motion Pictures
- ! Movie Theatres
- ! Museums
- ! Music
- ! Mutual funds
- ! Navy
- ! Newspapers
- ! Nurses
- ! Nutrition
- ! Office Machines
- ! Office Furniture
- ! Oil Changes
- ! Optometrists
- ! Orthodontist
- ! Painting
- ! Parking
- ! Parties
- ! Pediatricians
- ! Pedicures
- ! Pensions
- ! Perfume
- ! Personnel
- ! Pest Control
- ! Pets
- ! Pharmacies
- ! Phones
- ! Photography
- ! Physician
- ! Pianos
- ! Pizza
- ! Plastics
- ! Pollution
- ! Pools
- ! Preschools
- ! Printing
- ! Property Mgmt.
- ! Psychiatrists
- ! Psychologists
- ! Publishers
- ! Racing
- ! Radio
- ! Railroad
- ! Rehabilitation
- ! Religion
- ! Rental agencies
- ! Reporters
- ! Resorts
- ! Rest Homes
- ! Restaurants
- ! Roller Blading
- ! [illegible]
- ! Safety
- ! Sales
- ! Sandblasting
- ! Satellites
- ! School
- ! Screen Printing
- ! Scuba Diving
- ! Secretaries
- ! Security
- ! Self Defense
- ! Sewing
- ! Sheetrock
- ! Shoe repair
- ! Siding
- ! Signs
- ! Singing
- ! Skating
- ! Skeet Shooting
- ! Skiing
- ! Skin Care
- ! Soccer
- ! Social Services
- ! Softball
- ! Software
- ! Spas
- ! Sporting goods
- ! Steam cleaning
- ! Stereos

- T-Shirts
- Tailors
- Tanning
- Salons
- Taxes
- Teachers
- Telecom
- Telemarketing
- Television
- Tennis
- Theatres
- Therapists
- Tile Layers
- Tires
- Title Companies
- Tools
- Towing
- Townhouses
- Training
- Transmissions
- Trucking
- Typesetting
- Unions
- Universities
- Upholstery
- Used Cars
- Vacuum Cleaners
- Vending
- Veterans
- Video
- Volunteers
- Wallpaper
- Waste
- Watches
- Water Skiing
- Weddings
- Wine
- Woodworking
- Writing
- Zoos

Do You Know Anyone That Lives in the Following States?

- Alabama
- Alaska
- Arizona
- Arkansas
- California
- Colorado
- Connecticut
- Delaware
- Florida
- Georgia
- Hawaii
- Idaho
- Illinois
- Indiana
- Iowa
- Kansas
- Kentucky
- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- Missouri
- Montana
- Nebraska
- Nevada
- New Hampshire
- New Jersey
- New Mexico
- New York
- North Carolina
- North Dakota
- Ohio
- Oklahoma
- Oregon
- Pennsylvania
- Rhode Island
- South Carolina
- South Dakota
- Tennessee
- Texas
- Utah
- Vermont
- Virginia
- Washington
- West Virginia
- Wisconsin
- Wyoming

Another way to look at The Ultimate Memory Jogger

LIST YOUR WARM MARKET FIRST

Address Book
Business Cards
Christmas Card List
Neighborhood List
College Friends
Co-workers
Old co-workers
Teachers

LIST YOUR RELATIVES NEXT

Parents
Brothers
Aunts
Nieces
Nephews
Grandparents
Sisters
Uncles
Cousins
Grandkids
Father-in-law
Mother-in-law
Brother-in-laws
Sister-in-laws
Other in-laws

WHO IS/ARE MY... ?

Accountant
Association members
Auto mechanic
Bowling Team members
Bus driver
Car salesman
Card group
Child Care Provider
Children's friends parents
Church members
Club members
Convenient Store Manager
Co-workers
Delivery Person
Dentist Office employees
Doctor's Office employees
Donut Shop Manager
Dry Cleaner
Fed Ex Driver
Fireman
Fishing buddies
Florist
Friends
Housekeeper
Hunting buddies
Insurance Agent(s)
Jeweler
Lawyer
Leasing Agent
Mailman

Maintenance Person
Minister(s)
MLM friends
Neighbors
Optometrist
Paperboy
Pharmacist
Police
Property Manager
Favorite Waitresses
Favorite Waiters
Computer Tech
ISP Support Person
Pet Groomer
Retired Coworkers
Retired Friends
Retired Relatives
Bottled Water Supplier
Coffee Supplier
Florist
Sports Team members
Supermarket managers
Tailor
Hairdresser
Truck Drivers
UPS Driver
Veterinarian
Barber
Day Care Owner

WHO SOLD ME MY...

Appliances
Boat
Business cards
Camper
Car
Computer
Craft Supplies
Fishing license
Fishing Bait
Furniture
Glasses/contacts
HDTV
House
Hunting license
Office Equipment/Supplies
Telephone/Cell Phone
Tires And Auto Parts
Sony® Playstation
Stereo
Vacuum cleaner
Wedding items

I KNOW SOMEONE WHO IS A ...

Antique Dealer
Art Instructor
Avon Rep
Bank Teller
Bus Driver
Carpenter
Chiropractor
Contractor
Dietitian
Editor
Electrician
Fire Chief
Fisherman
Garage Mechanic
Golf Pro
Interior Decorator
Lab Technician
Librarian Real Estate
Lifeguard
Model
Motel Owner
Music Teacher
Notary Public
Nurse
Office Manager
Pilot / Stewardess
Printer
Restaurant Owner
Seamstress
Secretary
Security Guard
Sheriff

Student
Tupperware Rep
Waitress
Welder

I KNOW SOMEONE THAT ...

Cuts My Grass
Delivers Parcels / Packages
Dry Cleans My Clothes
Goes Bowling with Me
Hung My Wallpaper
Is in My Book Club
Is in Rotary, Lions
Is My Baby-sitter
Is my Barber/Hairdresser
Is my Former Boss
Lives Next Door
Owns My Apartment
Painted My House
Repaired My TV
Sells Ice Cream
Sells Me Gasoline
Teaches Ceramics
Teaches My Kids
Was in my Car Pool
Was my Best Man
Was My Maid of Honor
Was My Navy Buddy
Was my Photographer
Was my Professor
Was My Teacher

I ALMOST FORGOT ABOUT...

Judges
Fast Food Chain Employees
Hotel Managers
Motel Managers
Emergency Medical Service
Farmers
Agriculturalist
Conservation Officers
Gas Stations
Monument Business
Funeral Director
Grain Operators I.e.. Elevators
Landscapers
Title Agent
Speech Therapist

THIS IS TOO FUN TO STOP SO...

My Broker
My Bank Teller
The Scuba Instructor
The Karate Teacher
The Piano Teacher
My Landscaper
The Guy Delivering My Gas
The Coffee Shop Group
The Cub Scout Leader
People I Met At The Fair
The Taxi Driver
My Garbage Man/Woman

© 2005-2010 Michael J. Maher, MBA – Author
(7L) The Seven Levels of Communication: Go
from Relationships to Referrals

KW
Rising
Stars

Generating Business Using your Sphere of Influence

Your personal network of family and friends, otherwise known as your "Sphere of Influence" (SOI)– can be a fundamental business-building source. Organizing your Sphere of Influence now will help prepare you for a successful career as a real estate salesperson.

Complete the following

- ☐ *Read the article below by Blanche Evans*
- ☐ ***Using the suggestions in the article, begin building your Sphere of Influence***

Circle of friends

Who Falls Within Your Sphere of Influence?

Looking for new business? It might be closer than you think.

BY BLANCHE EVANS, ASSOC. EDITOR REALTY TIMES

As a new salesperson, one of the first tasks your manager will instruct you to carry out is to contact your sphere of influence and tell everyone in it that you are now a real estate professional and would like their business and referrals. Your sphere is where you will most likely be get your first sales, so it's important for you to know how large your sphere really is--it's all the contacts you've ever made!

If you are like most real estate professionals, your sphere consists strongly of your family and friends. But the sphere is really much larger than you realize. It can include everyone whose lives you touch in the most major or minor ways.

You need these names to prospect for business, because you won't sell any homes if no one knows who you are in the real estate business. You have to pick up the phone, compose e-mails or fill out postcards, and let people know what you do for a living. And then you have to remind everyone you know month after month that you are available and eager to do business.

Everyone? Yes, everyone. That can be an overwhelming thought, so you need to organize all those people into manageable lists with their names, contact information, and personal data. Every contact should have a full name, address, day and evening phone, cell phone (if available), work address, business and personal e-mail addresses (marked with which is preferred), immediate family member names, birthdays, and personal facts. You should have a record of dates on which you contact these people. If you have a contact

management program for your computer, you should input this information as soon as possible, so you can start sending e-mail listing alerts, newsletters, market conditions reports, e-cards or whatever follow-up tools you have chosen to stay in front of your contacts.

Start with the easiest people to reach--your family and friends. Contact everybody who has earned an entry in your address book and tell them that you are in the real estate business and are looking for new business and/or referrals, then tell them how you can be contacted. Spend at least one to two hours a day calling people you know. Make this a daily habit.

Next are acquaintances, people you see infrequently, but wouldn't consider close friends. This might include neighbors, church and club members, parents of your children's friends, and others. Your circle of service providers should also be included, such as your banker/teller, dry cleaner, mechanic, stock broker, clothing salesperson, and grocery clerk, among others.

This list may be more difficult to develop; you don't call these people without a reason like you do close family and friends,. Put them on your contact list anyway. If you have trouble thinking of them, take out your datebook and see what your errands are in a typical week. Get into the habit of asking names at each stop and remember to put them into your contact manager. Don't prejudge and assume that someone in a service position may not be able to afford your services. The college girl serving you Frappacino may be closer to buying a condominium than you think.

Next, build up to people with you may have lost contact or don't see as frequently, such as school chums, past co-workers, and friends of friends. To jog your memory, get out old employee lists or school directories that you may have lying around.

Very soon, you will work your way up to contacting people you don't know, but these lists of people will give you plenty to keep you busy for a while. Remember, daily contacts are a must to build your business. Getting into the habit of making those daily calls will help you become a true professional faster. Prospecting is a numbers game, sooner or later, you will hit upon someone who needs your services, and the more that need you, the more referrals you have. That's how a real estate business is built from the ground up.

Building Your Sphere of Influence List

Using the list below, identify broad categories of people that you could potentially contact. Highlight, or place an X in the box next to each group that you could contact in order to offer one or more Real Estate services to. Use the blank spaces to identify other contacts that you think of that are not listed.

- Immediate Family
- Recreational Partners
- Civic Activity Contacts
- Merchants
- Attorneys
- Hair Stylist
- Postal Carrier
- Bank Personnel
- Corporate Executives
- Insurance Sales-Partners
- Restaurant Personnel
- Car Salesperson
- Car Service Personnel
- Roofer
- Decorator
- Plumber
- Painter
- Dry Cleaner
- Clergy
- Out-of-Town Family
- Spouse's Relatives
- Parents of Children's Friends
- Former Co-workers
- Neighbors
- Former Neighbors
- Friends
- College Classmates
- High School Classmates
- Church Members
- Club Members
- Doctors
- Chiropractor
- Holiday Card List
- Personal Phone Directory
- Spouse's Work Contacts
- Health Club Members and Employees
- _____
- _____

The second step in prospecting is to identify specific people in each category and collect basic information about each contact. Some contacts you have a great deal of information about, even personal information. Other contacts you will have little more than a name, address and phone number. Regardless of what information you have, you need to organize it, so you can manage the contacts you make with each person.

ALWAYS wear your name tag. It makes you more approachable.

Join a health club or actually go to the one to which you already belong.

Take a class, any class:
- Whole Foods
- Home Depot
- Michaels
- World Coffee
- JEDCO
- Craig's List
- New Orleans School of Cooking
- Dale Carnegie
- Local Community Center
- Church
- Yoga, Tai Chi, Karate, etc.

Join a club, any club:
- www.meetup.com
- www.neworleans.com
- www.yahoo.com (groups)
- Sierra club
- Yacht club
- Track club
- Country club, etc..

Neworleansnetwork.org

Local Mall: Makeup counters, food court, set up a desk or rent a kiosk one day/week

Bookstore: Look for the bookstore bulletin board and attend book signing events or special readings – the idea is to show up a little early so you can chat with people before the event begins.

Join a Book Club. See Craig's list, or your local library or bookstore bulletin board.

Wine tasting: Local restaurants, join a winetasting club, Craigslist

Art Galleries and Museums: Many museums and galleries have special events. If you're shy, just smile at everyone you see...many will approach you and take the pressure off.

Sporting Events: Make it a point to get to know the person(s) seated next to you.

Flea Markets and Antique Shows. Get to know the vendors and take all their cards/brochures.

Garage Sales: Make it a weekly ritual. You get to know your neighbors and possibly even pick up a listing lead.

Play a sport and/or join a league: Look for the ones that have social gatherings after the events.

Singles Group: Join or just attend occasional meetings or events

Volunteer: Any position where you must interact with others

Have a Party: Invite your friends and have them invite two friends each

Homeowner's Association meetings in your neighborhood: ask the president to allow you to make short presentations about market activitiy in their neighborhood, bring food, host their website.

Community theatre: Take up acting, go to acting workshops, volunteer to assist the director or property master

Professional Trade Associations: attend meetings or monthly breakfasts

Attend your spouse's Business Association event(s)

Go to High School/College reunion and/or Alumni Activities

Get a dog or, or walk the one you have

Go to every Party you are invited to: even if you don't feel like it.

Join an Investment Club

Go to any seminar

Join a women's or men's group

PTA events

State and National Trade Shows

Chamber of Commerce

Referral / Leads Groups Kiwanis, Rotary, Lions, Elks, Moose

Join the board of your favorite charity

Stand outside of a coffee shop and hand out real estate articles with your business card attached. (Wear your name tag and clear it with the owner/manager first)

Have coffee/tea/juice/breakfast at the same place every day at the same time. Meet your clients their so other patrons begin to recognize you.

Happy hour. Become a regular patron and always sit alone. (Remember to switch to water or softdrink after two)

Great B2B Ideas:

- Divorce Attorneys
- Accountants
- Dentists/Doctors
- Bankers
- Financial Advisors

REMEMBER: 90% of success is showing up.

Garage Sales

Car Dealers

Financial Advisors

HOA Associations

Running Club

Exercise Classes

Gym/Personal Trainers

New Home Builder Reps

College Alumni Associations

Weddings

Move In Parties

City Holiday Celebrations

CPAs

BNI: Business Network International

Mortgage Companies

Title Companies

Inspectors

Appraisers

Moving companies

Chamber of Commerce

PTAs

Volunteer for School Trips

Choir

Sports/Booster Clubs

Teachers

Principals

Lawyers

Charities

Relocation Companies

Country Clubs

Realtor Seminars

College Alumni Associations

First-time Homebuyer Seminars

Sororities/Fraternities

Apartment Representatives

Places of Worship

Plumbers

Pest Control Services

HVAC Contractors

Door Knocking

Veteran Associations

Hair Salons

Realtor Associations

Singles Organizations

Social Clubs

Meetup.com

Your Database is Your Goldmine!!!

However, COMPLEXITY IS THE ENEMY OF EXECUTION!!!
So keep it simple! Make a plan, time-block and schedule the component parts, leverage where and as soon as possible, and execute!

36 Touch - By the Quarter

1. **Email (12)**
   - Email campaign (12 direct) - set it and forget it

2. **Snail Mail (12)**
   - Agent Newsletter - time block 2 hours to customize monthly & choose 3 strategic partners to showcase

3. **Phone Calls and/or Face to Face (4)**
   - Phone Calls - time block weekly (# in database divided by # of days you will call during the quarter = # people to be called each day). For example: 240 people in your database means that if you are going to be calling 3 days each week then that's 36 days of calling in a quarter (3 days per week x 12 weeks). So, 240 people divided by 36 = 7 calls per day
   - Pop-by's – twice monthly - visit 5 people face to face (from your top 120). Consider www.daysoftheyear.com and www.popbyideas.com for unique pop-by ideas.
   - Coffee meetings – weekly (from your top 50)
   - Events – consider customer appreciation events, housewarming parties, barbeques, wine tastings, happy hours, holiday parties, neighborhood events, charity events, workshops, etc.

4. **Notecards (4)**
   - Handwritten Notes - after each call or face to face visit

5. **Quarterly Touch (4)**
   - Quarterly touch – seasonal, holiday theme, or market update – send 2 in postcard format and 2 via email

12 emails
+ 12 newsletters
+ 4 phone calls or face to face
+ 4 handwritten notes
+ 4 quarterly touches

= 36 High Quality Touches!

Obviously, some people will see you more than once each year, but don't skip the pop-by because it is purposeful and fun and coming from a place of contribution. If you thoughtfully use social media throughout the year, these will also be bonus touches.

At the MREA-proven 12:2 return, a database of 240 people should yield you 40 transactions annually. If you shoot for a database of 125 strong relationships plus another 100-150 mets, you will have a business that will consistently bring you the new, repeat, and referral business that will make cold calling a thing of the past!

Your **Top 5 Platinum Partners** are well-connected and influential and love to refer you to the people they know!
Your **20 Gold Partners** love you and love to refer you!
Your **100 Silver Partners** love you and will refer you if the opportunity arises!
Your **100-150 Bronze Partners** will be a great source of business for you!
Everyone else is Lagniappe!

Property Sale Information Sheet

Property Address: _____

Seller: _____ Buyer: _____

Contract Date: _____ Closing Date (Est.): _____

Seller	Buyer
Listing Broker: _____ Phone: _____ Fax: _____ Listing sales associate: _____ Home Ph.: _____ Office Ph.: _____ Mobile Ph.: _____	**Selling Broker:** _____ Phone: _____ Fax: _____ Selling sales associate: _____ Home Ph.: _____ Office Ph.: _____ Mobile Ph.: _____
Seller: _____ Old address: _____ New address: _____ City, State, Zip _____ Current Home Ph.: _____ Ofc.: _____	**Buyer:** _____ Present address: _____ City, State, Zip _____ Current Home Ph.: _____ Ofc.: _____ Will buyer occupy new home? _____
Existing mortgage for Payoff (P) Assumption (A) 1st Mortgage holder: _____ 2nd Mortgage holder: _____	New Mortgage Lender: _____ Type (Fixed; ARM: FHA, VA, Conv.): _____ LTV Ratio: ____ % Interest Rate: ____% Yrs: ____
Seller's Attorney: _____ Ph.: _____	Buyer's Attorney: _____ Ph.: _____
Lender: _____ **Title Company:** _____ **Appraiser:** _____ **Date Scheduled to Close:** _____	**Loan Officer:** _____ **Closing Agent:** _____
Service Providers: Pest inspection: _____ Home inspection: _____ Roof inspection: _____ Contractor: _____ Surveyor: _____	 Ph.: _____ Ph.: _____ Ph.: _____ Ph.: _____ Ph.: _____

Buyer's Insurance Company: _____

Agent: _____ Phone: _____

Property status: ❑ Occupied by seller ❑ Occupied by tenant ❑ Vacant

Key to property for inspection: ❑ At listing office ❑ In lockbox at property ❑ Call seller for appointment

Closing Progress Chart

Listing Sales Associate				Closing Progress Chart	Selling Sales Associate			
#	Sched Date	Actual Date	X	Closing Duties	Done	X	Sched Date	Actual Date
1				"Sale pending" sign on listing				
2				Notice of under contract to MLS				
3				Binder deposited in bank $_____				
4				Additional binder received, if required. $ _____				
5				Loan application made by buyer				
6				Contingencies cleared in writing:				
7				Home inspection by: _____				
8				Soil test from: _____				
9				Roof inspection by: _____				
10				Other (describe): _____				
11				Appraisal by: _____				
12				Loan approval from: _____				
13				Title insurance ordered from: _____				
14				Pest inspection ordered (after loan approval) from:				
15				Report received and delivered to buyer				
16				Report received and delivered to lender				
17				Treatment ordered, if required				
18				Structure inspection ordered, if necessary				
19				Work completed and approved				
20				Required repairs ordered				
21				Required repairs completed				
22				Survey ordered (After loan approval)				
23				Survey completed. Results. . .				
24				Encroachments, survey problems cleared				
25				Buyer to get hazard insurance				
26				Insurance policy to title closing agent				
27				Buyer/seller contacted for closing appointment				
28				Pre-closing inspection				
29				Closing papers reviewed with buyer/seller 1 day prior				
30				Buyer given figure for certified check for closing				
31				Binder check prepared to take to closing				
32				Closing date				
33				Signed closing papers received by sales associate				
34				Post-closing duties:				
35				Commission check to broker				
36				Sign/lockbox picked up from property				
37				Buyer/seller letter of thanks				
38				Follow-up visit to buyer/seller				
39				Notice of closed sale to MLS				

Date:

	Daily Work Plan	Actions Accomplished
8:00 AM		SOI
		Calls made: _____
9:00 AM		Handwritten notes: _____
		Pop-bys: _____
10:00 AM		Coffee meetings: _____
11:00 AM		Pipeline Prospects
		Calls made: _____
12:00 PM		Emails sent: _____
		Newsletters sent: _____
1:00 PM		
		Farm
2:00 PM		Doors knocked: _____
		Face to Face: _____
3:00 PM		Postcards delivered: _____
4:00 PM		Other
5:00 PM		
6:00 PM		
		New Appointments: _____
		Listing Consultations: _____
		Listings Obtained: _____
		Buyer Consultations: _____
		Buyer Agreements Signed: _____
		Contracts Written: _____
		Contracts Accepted: _____
		Closings: _____

Be Specific When You Ask

Reasons People Move

1. Who is the next person you know who is living in an apartment and would love to own a home of their own?
2. Who is the next person you know whose children are moving out and are finding that their home is too big?
3. Who is the next person you know who has a family that is expanding and is ready to move to a bigger home?
4. Who is the next person you know who lives in a neighborhood that is no longer convenient to where they work and would like to sell their home and move to a more convenient location?
5. Who is the next person you know who might also be selling their business and as a result may be moving?
6. Who is the next person you know who is about to retire and as a result may be moving?
7. Who is the next person you know who may be going through a divorce or has just gone through one and as a result may be selling their home or looking for a new one?
8. Who is the next person you know who might be changing jobs in your company and need help relocating?
9. Who is the next person you know who might be ready to buy a second home or vacation property?
10. Who is the next person you know who wants to live at the beach?

Buyer Lifetime Annuity Program:

How to get in touch, stay in touch, and guarantee clients (and referrals!) for life!

1. Call Buyer lead to establish connection and ask for Buyer Consultation appointment (use the Buyer Lead Sheet to get pertinent info!)

2. Enter all contact info into eEdge database and add Buyer to 33-Touch.

3. Send Getting to Know You form via email (or BombBomb) with Thank you and can't wait to meet you in person email (or video).

4. If the Buyer is ready to meet with you and start, send the Preconsultation Letter and continue to step 5. If they are not ready to buy a home in the next 30 days, proceed to the Buyer Pipeline Plan in step 11.

5. Buyer Consultation:
   a) Have the Buyer meet you at the office. Thank them for meeting with you.
   b) Before you begin the consultation, have the Buyer fill out the New Buyer Survey (and the Getting to Know You form if they haven't completed it yet).
   c) Review the New Buyer Survey and confirm info recorded on the Buyer Lead Sheet.
   d) Conduct the Lifestyle Interview and Needs Analysis (remember to go deep...ask "What about that is important to you?" multiple times!).
   e) Uncover their 5 Must Haves and get them to sign the 5 Must Haves sheet.
   f) Cover pertinent material in your Home Buying Guide. (This is the time to set expectations about how you work and how their transaction will be handled.)
   g) Use The Market page to educate them about current market conditions.
   h) Get the Buyer Loyalty Agreement signed!
   i) Talk about the RAS and ask for referrals using the Referral sheet.

6. Search for properties and show them their ideal home.

7. Make an offer.

8. Bulletproof your transaction and implement Go Green touches:
   a) Congratulations note to Buyer
   b) Turbulence letter
   c) Outstanding service directory
   d) Children's packing labels and letter
   e) Popcorn letter
   f) Utilities letter
   g) Final Walkthrough Tips letter
   h) Moving Day Pizza coupon
   i) Moving Day Survival Kit
   j) Welcome to the Neighborhood card signed by at least 10 neighbors

9. Do your happy dance!!!

10. Add Buyer to Post-closing Marketing Plan (see step 12)

11. If the Buyer is not going to buy in the next 30 days, add them to your Buyer Pipeline Plan (and they should also be on your 33 Touch)
    a) Week 1 – follow up via phone or email to get the Getting to Know You survey
    b) Week 2 – send Buyer Newsletter (whichever newsletter is set for that particular month)
    c) Week 3 – use social media to connect with the Buyer
    d) Week 4 – follow up via phone to ensure they're getting your communications and to let them know that you'll keep in touch and touch base with them regularly to answer any questions they might have and keep them informed about market changes.
    e) Month 2 – send Buyer Newsletter
    f) Month 3 – send email
    g) Month 4 – post on social media
    h) Month 5 – contact them by phone
    i) Month 6 – send Buyer Newsletter
    j) Month 7 – send email
    k) Month 8 – post on social media
    l) Month 9 – contact them by phone
    m) Month 10 – send Buyer Newsletter
    n) Month 11 – send email
    o) Month 12 – post on social media
    p) Month 13 – contact them by phone

12. Buyer Post-closing Marketing Plan:
    a) 1 day - Thank you card
    b) 1 week - Client Satisfaction Survey letter and questionnaire
    c) 2 weeks - Popcorn letter
    d) 4 weeks – Housewarming Party
    e) The following January - Settlement Statement letter
    f) 1 year - Anniversary letter
    g) Ongoing – 33 Touch

Marketing Plan
Your Name Real Estate Team

Q2 2015

Quarterly:

1. Postcard – mailed to everyone in database in April
    a. Theme?
2. XX pop-by's – schedule in May
    a. Theme?
    b. All Q4 2014 customers (including orphaned buyers/sellers) and database top 25

Monthly:

1. 1 coffee and 1 lunch – schedule every other week
    a. Target – XX contacts per meeting
    b. Follow up with all contacts (note cards and follow up phone calls)
    c. Have purposeful conversations with guests – "How can I help you?" "Who do you know...?"
2. eEdge 12-direct email
    a. Continuation of 12-direct campaign
3. Newsletter
    a. Short personal message
    b. Short article/promo from strategic alliance
    c. Market snapshot
    d. Featured listing

Weekly:

1. Phone calls – approximately 50 per week
    a. 20 SOI calls
    b. current seller calls
    c. current buyer calls
    d. follow-up calls to potential/pipeline leads
    e. 5 strategic alliance calls