

Buyer - Convers⁸ Call Template

Discovery

"I can ask you the same questions 99% of the agents out there will and end up going down the wrong path. That is absolutely not my goal. I'd like to learn about you, a day in the life in your shoes, which is where I will get the information we absolutely need for me to provide the best service to you and your family. These are personal questions, so I'm asking permission first. Would you be open to having a conversation like this?"

While they are sharing you may have to ask additional questions to help or keep them going. Your best move is to have them go deeper by asking questions like: "That's interesting, tell me more about that?" "Wow really! How did that happen?" My rule is to go five layers deep on my questions so I learn everything I need to close them.

These are a few question topics as an overview of this process you can ask to get the ball rolling:

- Great, take me through a day in the life of you. Let's start with your morning routine...
- Learn, Learn, Learn... **LISTEN SO AND MAKE NOTES ON THE INFO SO YOU CAN REPEAT IT BACK LATER**
 - ☐ Kids
 - ☐ Pets
 - ☐ Hobbies
 - ☐ Church
 - ☐ Friends
 - ☐ Work
 - ☐ Cars
 - ☐ Clubs
 - ☐ Get it all!
- What area of the home does your family spend the most time in... tell me about that?
 - ☐ Kitchen
 - ☐ Livingroom
 - ☐ Gameroom
 - ☐ Bar
 - ☐ Porch
 - ☐ Driveway
 - ☐ Garage
 - ☐ Bedroom

What to do when the lead is not responding or giving one word responses. Stop the process and ask permission to proceed with personal questions so that you may learn about them! If they aren't willing to do this you probably won't be a good fit to work together.

Logic

Show them you were listening by stating what you learned and confirming.

- ☐ "Thank you for sharing all of this with me! To make sure I got it all down correctly this is what I heard..."
- ☐ Repeat back in bullet points what you learned about them.

- ☐ Then ask them “Did I get that right? What did I miss?”

Once they’ve replied in full affirm their response

- ☐ “Ah, thanks! Now I’ve got the complete picture.”

Data

Build the perfect scenario in their head!

- ☐ We want to build exactly what they want using their words from what they shared with us already and get them to state how they will feel when they walk through the door once it’s theirs.
- ☐ The goal for us is painting the picture of the perfect new home for them in their minds.
- ☐ **This is the most important step! Get them to verbalize this feeling and you have a closing on your hands!**

“Now can you paint a picture in your words of the perfect home that encompasses everything we’ve discussed. Try not to leave out any details that really stand out in your mind. Let’s start with your favorite room...” **Let them lay out in their words the perfect home. If they get stuck, remind them of what they’ve shared previously so they can add details you know they won’t want to miss.**

“This is wonderful! Now, I want you to imagine that we’ve found this exact home. Our offer won and we’ve gone under contract, deposited the earnest and option money, had an inspection completed and negotiated some additional concessions from the seller to help pay the closing costs, worked with the lender to get everything they needed and had the appraisal come back in great shape, worked with the title company and HOA to secure all that was needed, sat down at the title company and signed all the paperwork then stepped out to grab a cold drink and a snack while we waited for all the funding to go through. I get the call from the title office and let you know I’ll swing by, pick up the keys then meet you and the family over at the house. You watch me pull up, kids are playing in the yard and you’ve got the moving truck backed into the drive. I walk up and congratulate you as I hand you the keys. You turn around and unlock the door and as it swings open your family rushes inside to check everything out in their new home... What are you feeling at this moment?” **Let them share all the feelings that come to mind without saying a word.**

“Ah thank you. Now we know exactly what we are in this for! The next step is choosing from your options to move forward. Here’s what we’ve got...”

Options

Now it’s time to present the options:

“...Here’s what we’ve got to choose from...”

For Buyers: 3 choices

- ☐ Brand new construction / Spec **Be descriptive using their words on this option**
- ☐ Established home in an established neighborhood **Be descriptive using their words on this option**
- ☐ Find a rental or stay where you are now

“Which one of these options is best suited to help us achieve your goal?”

Be quiet and give them time to think... The first person to speak here loses, don’t be that guy!

Once they have picked their option, show gratitude and congratulate them for choosing an option.

"That is a great choice! Now..."

Driving

"I'm going to lay out all of the options for you at each stage of the transaction just like this for you to choose from. I am here to help and serve as a guide and advisor through this process so that you are able to reach your goal with confidence. Okay?"

By asking "Okay?" we are going for the close. Let them be the first person to speak here and we will get another "YES" from them which is what we need to move onto the next step.

Next Steps

BUYERS:

- ☐ You will get proof of funds in writing from your bank or submit an application for a pre-approval from one of our trusted lending partners today and get it back to me via email.
- ☐ You will confirm receipt of the detailed list of homes I've sent over to choose from.
- ☐ You will pick out the top 3-5 homes that you would actually like to purchase seeing just the photos and information shown in the listing (max of 5 homes) and text/email me those addresses.
- ☐ We will be ready to submit 2-3 offers from those choices after touring them all that day.

ME:

- ☐ I will text/email the contact information and connect you with our lending partners.
- ☐ I will confirm receipt of your proof of funds or a pre approval in writing by replying "Confirmed" to your email.
- ☐ I will email a detailed list of homes for you to choose your top 3-5 options from.
- ☐ I will confirm receipt of the text/email and schedule the top 3-5 homes and schedule our tour (max of 5 homes) and have the briefs printed for us to make notes along each stop on pros/cons/condition.
- ☐ I will be ready to submit 2-3 offers after researching the comps and discussing the best offer price on each of the choices after touring them all that day.

"Does this sound fair to you?"

Set The Appointment

"What is the best time for us to meet with all parties present today or tomorrow?"

Let them be the first person to speak here and we will get the day and time from them which is what we need to move onto the next step.

Confirm Expectations

This is all you do:

1. Ask them to repeat their tasks.
 - ☐ You will get proof of funds in writing from your bank or submit an application for a pre-approval from one of our trusted lending partners today and get it back to me via email.

- ☐ You will confirm receipt of the detailed list of homes I've sent over to choose from.
 - ☐ You will pick out the top 3-5 homes that you would actually like to purchase seeing just the photos and information shown in the listing (max of 5 homes) and text/email me those addresses.
 - ☐ We will be ready to submit 2-3 offers from those choices after touring them all that day.
2. Repeat the tasks you will be doing.
- ☐ I will text/email the contact information and connect you with our lending partners.
 - ☐ I will confirm receipt of your proof of funds or a pre approval in writing by replying "Confirmed" to your email.
 - ☐ I will email a detailed list of homes for you to choose your top 3-5 options from.
 - ☐ I will confirm receipt of the text/email and schedule the top 3-5 homes and schedule our tour (max of 5 homes) and have the briefs printed for us to make notes along each stop on pros/cons/condition.
 - ☐ I will be ready to submit 2-3 offers after researching the comps and discussing the best offer price on each of the choices after touring them all that day.

Then the close:

BUYERS:

Ask them: "Do we have time to speak with my lender now to get that pre-approval?"

Do a three way call with your preferred lender and the client right now if possible otherwise share the contact information via text/email CCing the lender as an introduction.

"Awesome! Now I'm off to go to work for you.

- ☐ I'll have the list of 20 properties over shortly for you to choose your top 3-5 from
- ☐ Text or email me back those and I'll get the tour scheduled and a calendar invite for ___am/pm today/tomorrow over to you
- ☐ Once I have the tour locked in I'll email you the tour guide with the starting address

When you have a question just let me know. Thanks and I'll talk with ya in just a bit!"

Congrats! You just locked in a qualified client who is ready to do business with you!

- ☐ **Make your detailed notes in the lead profile in kvCore**
- ☐ **Change the Client Journey Status to **CLIENT** and remove all campaigns assigned to them**
- ☐ **Then input the appointment details and send over your calendar invite so you have it locked and loaded and get to work on the rest of your tasks.**