**HOMEEASY SALES PLAYBOOK**

INTRODUCTION

This comprehensive guide provides step-by-step instructions for sales representatives handling remote sales outsourcing operations for Home Easy. It covers every aspect of the sales process from initial lead engagement to post-move-in follow-up, with practical examples, scripts, and troubleshooting guidance.

TRUST & ACCOUNTABILITY FRAMEWORK

Trust is the foundation of our business. It is built by consistently doing what we say we will do—no matter how small or large the commitment. Our guiding principle is: "Say it. Do it."

Core Trust Principles

* Follow Through on Commitments  
  + If we promise to call a customer at 8:00 AM, we call at 8:00 AM
  + If we say we will respond within 10 minutes, we do so (or even sooner)
* Proactive Communication  
  + In cases of delays or capacity constraints, it is our responsibility—not the renter's—to inform the customer with a clear, logical explanation
  + We communicate any changes immediately and outline the next steps before ending every interaction
* Structured Interactions  
  + Every major interaction must conclude with a clear action plan: "I will send you the list of available units in 10 minutes, and I expect your feedback within 5 minutes"
  + This structure ensures that both the customer and our team remain accountable
* Accountability Breeds Accountability  
  + Our internal accountability—ensuring our team follows through—sets the standard for customer accountability
  + Failure to meet our own commitments is considered an SLA breach and will incur penalties
  + By being relentlessly accountable, we build trust with customers, encouraging them to reciprocate with prompt and professional behavior

GENERAL GOVERNING PRINCIPLES & IDIOMS

Our approach is built on Socratic selling and logical progression. We never make assertions; instead, we extract statements in successive logical building blocks that lead to the sale. We proactively anticipate breakdowns and work to mitigate them.

Key Mindset Idioms

* Time is the enemy: Move swiftly—every minute counts
* Only the paranoid survive: Remain vigilant and proactive with follow-ups and anticipating issues
* The end is at the beginning: Establish the closing goal at the outset of every conversation
* The reasoning sale: Use logical, fact-based arguments to guide the client
* Externalize the pressure: Attribute urgency to external market forces rather than to yourself
* Speak in terms of the other person's interest: Frame every conversation around the client's benefit
* Extract statements; don't make them: Encourage the lead to articulate their needs and motivations rather than imposing assertions
* Do not increase the burden of proof: Avoid setting unrealistic expectations without first verifying that qualifying, matching inventory exists - e.g “I have got some great options for you” and “The best apartment for you”

1. SYSTEM SETUP AND DAILY PREPARATION

1.1 Morning System and Tool Setup

Step 1: System Access (15 minutes before shift start)

* Log in to all required systems:
  + Follow-Up Boss FUB
  + Slack groups
  + Open Phone
  + WhatsApp groups
  + Google Meet

Step 2: Status Check

* Set your status to "Available" on all communication platforms
* Ensure your phone system is properly connected
* Test your headset and microphone

Step 3: Lead Review

* Review leads assigned from previous day
* Check for any carry-forward clients from yesterday
* Prepare notes on high-priority leads for immediate follow-up

Step 4: Calendar Organization

* Review calendar for scheduled appointments
* Block time for internal team huddles and meetings
* Set reminders for all follow-up actions due today

1.2 Daily Productivity Setup

Create Your Daily Action Sheet

* Segment your leads into priority categories:
  + Urgent Follow-Up: Leads with scheduled actions today
  + High Intent/Direct Approval: Qualified leads likely to close quickly
  + High Intent/Indirect Approval: Qualified leads requiring additional steps
  + New Leads: Fresh leads requiring initial contact
  + Low Priority: Leads showing minimal engagement or distant timeframes

Set Personal Performance Targets

* Number of calls to make (minimum 20)
* Applications to process (target 3-5)
* Follow-ups to complete (all scheduled)
* Response time goal (aim for 2-3 minutes average)

2. LEAD RESPONSE AND INITIAL ENGAGEMENT

2.1 Rapid Lead Response Protocol

Step 1: Immediate Response (2-5 Minutes)

* Whenever a new lead appears in your queue, respond within 2-5 minutes
* Initial contact hierarchy:
  1. Phone call (highest priority)
  2. Text message (if call not answered)
  3. Email (supplementary to other methods)

Step 2: Record Response Attempts

* Log each contact attempt in Follow-Up Boss immediately, including:
  + Time of attempt
  + Method used
  + Result (answered, voicemail, no answer)
  + Any information gathered

Step 3: Multi-Channel Engagement

* If first call attempt is unsuccessful:
  + Leave a voicemail with clear callback information
  + Send a text message with your name and purpose
  + Follow up with an email containing basic information and options to schedule

Step 4: Alternative Scheduling

* If client cannot talk immediately, establish a specific callback time:
  + "I understand you're busy. Would 2:15 PM today work better for a 10-minute call?"
  + Send a calendar invite immediately while on the call
  + Request confirmation of the invite during the call

2.2 Initial Contact Scripts

Phone Call Script

Hello [Client Name], this is [Your Name] from Home Easy. I'm reaching out regarding your inquiry about rental properties in [Area].

Do you have a few minutes to discuss your needs so I can find the best options for you?

[If yes] Great! I'd like to understand a bit more about your situation.

[If no] I understand you're busy. When would be a better time for us to speak today? I can send you a calendar invite right now to make sure we connect.

Text Message Template

Hi [Client Name], this is [Your Name] from Home Easy. I received your inquiry about rentals in [Area] and I'd like to help you find the perfect place. When would be a good time for a quick call today? I have availability at [provide 2-3 time options].

Email Template

Subject: Your [Area] Rental Inquiry - Next Steps

Hi [Client Name],

I'm [Your Name] from Home Easy, and I'm reaching out regarding your inquiry about rental properties in [Area].

I'd like to discuss your specific needs to find the perfect options for you. I tried reaching you by phone, but we weren't able to connect.

Could we schedule a quick 10-minute call? Here are some available times (all times in [Time Zone]):

- Today at [Time 1]

- Today at [Time 2]

- Tomorrow at [Time 3]

Just reply with what works best, or call me directly at [Your Phone Number].

Looking forward to helping you find your new home!

Best regards,

[Your Name]

[Your Title]

Home Easy

[Phone Number]

2.3 The Three-Part Sales Call Structure

Part 1: Understanding Motivation & Pain (Pull Sale Technique & Socratic Selling)

Socratic Questioning Techniques

* Start with open-ended questions about their current situation
* Use a neutral, landlord-like tone (not salesy)
* Implement the pull-sale technique to extract their statements

Essential Questions to Ask:

1. "What's prompting your move at this time?"
2. "Why not just stay where you are currently living?"
3. "Have you considered extending your current lease?"
4. "What's your timeline for making a decision?"
5. "What are the most important features you're looking for?"

Pain Point Identification Matrix

| **Common Pain Points** | **Probing Questions** | **How to Leverage** |
| --- | --- | --- |
| Lease ending | "When exactly does your current lease end?" | Create urgency based on timeline |
| Relocation for work | "When does your new position start?" | Connect housing need to job security |
| Unhappy with current living | "What specific issues are you facing?" | Position new options as solutions |
| Need more/less space | "What's changed that requires different space?" | Focus on how new space meets changing needs |
| Budget constraints | "What's your ideal budget range?" | Present value proposition of options |

Active Listening Techniques

* Take detailed notes of all motivations mentioned
* Repeat key points back to confirm understanding
* Use phrases like "I understand that..." and "It sounds like..."
* Listen for emotional triggers that indicate high motivation

Part 2: Qualification – Direct vs. Indirect Approval Path

Direct Approval Assessment (600+ credit & 3x income)

* Gather financial qualifications tactfully:
  + "To make sure I find places that you'll qualify for, may I ask about your credit score range?"
  + "Most properties require income verification. What's your approximate monthly income?"
* Verification questions:
  + "Are you currently employed full-time?"
  + "How long have you been with your current employer?"
  + "Do you have any rental history concerns I should be aware of?"

Indirect Approval Assessment

* Identify potential qualification obstacles:
  + Credit challenges
  + Income below 3x rent
  + Employment gaps
  + Prior evictions or broken leases
* Frame concerns constructively:
  + "This could make things a bit more complicated, but we have options. Would you be open to providing a higher security deposit?"
  + "Do you have someone who might co-sign the lease with you?"
  + "Some properties offer more flexible approval criteria. Would you be interested in those options?"

Documentation Requirements

* For Direct Approval:
  + Last 2-3 pay stubs
  + Photo ID
  + Proof of current address
  + Application fee payment method
* For Indirect Approval:
  + All of the above, plus:
  + Bank statements (showing savings/assets)
  + Letter of explanation for credit issues
  + Co-signer information and documentation
  + Proof of additional security deposit funds

Part 3: Creating a Plan of Action

High-Velocity Action Plan Components

* Specific, time-bound actions for both parties
* Clear next steps with deadlines
* Multiple touchpoints to maintain momentum
* Built-in accountability measures

Agent Actions to Include:

* "I will search for properties matching your criteria within 2 hours"
* "I'll contact specific buildings to check availability by 3:00 PM today"
* "I'll email you the top 3-5 options by [specific time]"
* "I'll schedule [virtual tours/in-person showings] for tomorrow"

Client Actions to Include:

* "Please send me your pre-qualification documents within the next hour"
* "Review the options I send and rank your top choices by [specific time]"
* "Complete the guest card information before our next call"
* "Prepare questions about specific properties for our follow-up call"

Securing Multi-Channel Commitment

* Schedule a specific follow-up call time
* Send calendar invite while on the call
* Request email address to send options
* Verify best phone number for text updates
* Confirm receipt of calendar invite before ending call

3. QUALIFICATION AND APPROACH CUSTOMIZATION

3.1 Direct Approval Approach (High Income, High Credit)

Tone and Communication Style

* Concierge, consultative approach
* Professional but warm
* Focused on value rather than urgency
* Emphasis on premium service and convenience

Presentation Techniques

* Present multiple options with pros and cons of each
* Highlight premium amenities and features
* Focus on lifestyle benefits and convenience factors
* Use phrases like "based on your qualifications" and "with your excellent credit profile"

Handling Unrealistic Expectations

* Use the exploration-education-solution approach:
  1. Exploration: Ask about previous rental experiences and market knowledge
     + "When did you last rent in this market?"
     + "What research have you done on current rental rates?"
  2. Education: Present market facts clearly
     + "Currently, the average 1-bedroom in that area is $2,400"
     + "Units with those specific amenities typically start at $X"
  3. Solution: Offer constructive alternatives
     + "I can show you similar options in nearby neighborhoods at a lower price point"
     + "Would you consider adjusting your requirements from a 2-bed to a 1-bed to meet your budget?"

Premium Experience Elements

* Personalized property selections
* Virtual tours with detailed commentary
* Building/neighborhood insider information
* Streamlined application process
* Move-in coordination assistance

3.2 Indirect Approval Approach (Low Income, Low Credit)

Tone and Communication Style

* Fact-based, direct approach
* Urgency-driven communication
* Market-focused reasoning
* Solution-oriented dialogue

Urgency Creation Techniques

* Emphasize limited inventory for flexible approval criteria
* Highlight competitive demand for such properties
* Stress time-sensitive nature of alternative approval options
* Note that many properties may not consider their application

Mitigation Strategy Presentation

* Present options with clear mitigation paths:
  + "With a co-signer, we can apply to these properties..."
  + "With an additional security deposit, these buildings would consider your application..."
  + "If we provide letters explaining credit circumstances, these properties may approve..."
* Create logical connections between their situation and your solutions

Setting Realistic Expectations

* Be transparent about approval challenges
* Provide clear success criteria for each property
* Explain application review timelines
* Prepare them for possible rejections and have backup plans

4. CREATING AND DOCUMENTING ACTION PLANS

4.1 Structured Action Plan Development

Step 1: Define the End Goal

* Identify the specific outcome (e.g., application submission, tour scheduling)
* Set a target completion date
* Break down the path to completion

Step 2: Create Time-Bound Steps

* Develop a chronological sequence of actions
* Assign specific timeframes to each step
* Include both agent and client actions
* Example timeline:

Today, 2:00 PM: Agent sends property optionsToday,

4:00 PM: Client reviews and selects preferencesToday,

5:00 PM: Follow-up call to discuss selectionsTomorrow,

10:00 AM: Virtual tour of top choicesTomorrow,

2:00 PM: Application submission

Step 3: Document Responsibilities

* Clearly delineate client vs. agent tasks
* Set expectations for deliverables
* Establish communication checkpoints

Step 4: Secure Buy-In

* Verbally confirm agreement to the plan
* Send written confirmation via email
* Request explicit acknowledgment
* Calendar invitations for all scheduled interactions

4.2 FUB Documentation Requirements

Follow-Up Boss Comprehensive Note Structure

1. Call Summary Section
   * Date and time of conversation
   * Call duration
   * Client's current situation summary
   * Key motivations identified
2. Qualification Details Section
   * Credit score range
   * Income information
   * Employment status
   * Rental history notes
   * Approval path determination (Direct/Indirect)
3. Requirements Section
   * Preferred neighborhoods/areas
   * Unit type needs (bed/bath)
   * Budget range
   * Must-have amenities
   * Nice-to-have features
   * Timeline for move-in
4. Action Plan Section
   * Numbered list of next steps
   * Responsible party for each step
   * Due dates for each action
   * Status indicators (Pending, Completed, Delayed)
5. Follow-Up Schedule Section
   * Next contact date/time
   * Method of next contact
   * Purpose of follow-up
   * Preparation needed before follow-up

**Example FUB Note Format**

CALL SUMMARY (03/17/2025, 10:15 AM, 22 minutes):

Sam Johnson is relocating from Boston to Chicago for a new job starting 04/15. Currently staying with friends temporarily. Highly motivated to find a place before job starts. Prefers to move in by 04/10 at the latest.

QUALIFICATION:

- Credit: 720

- Income: $6,500/month

- Employment: Accepted offer with ABC Corp, starts 04/15

- Rental History: No issues, good references

- Approval Path: DIRECT

REQUIREMENTS:

- Areas: River North, West Loop

- Unit: 1BR/1BA

- Budget: $1,800-$2,200

- Must-have: In-unit W/D, fitness center

- Nice-to-have: Balcony, pet-friendly

- Timeline: Move by 04/10

ACTION PLAN:

1. Ryan (Agent) to send 5 property options by 12:00 PM today [PENDING]

2. Sam (Client) to review options and select top 3 by 2:00 PM today [PENDING]

3. Ryan to schedule virtual tours for tomorrow morning [PENDING]

4. Sam to prepare application documents and send by 5:00 PM today [PENDING]

5. Ryan to contact River North properties about availability by 1:00 PM [PENDING]

FOLLOW-UP:

- Next Contact: Today, 2:15 PM

- Method: Phone call

- Purpose: Review selected properties and confirm virtual tour schedule

- Prep: Have virtual tour links ready, application process details prepared

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4.3 Post-Call Communication Templates

Example of Action Plan Confirmation Email

Subject: Your Chicago Apartment Search Action Plan - Next Steps

Hi Sam,

Thank you for our productive conversation today about your move to Chicago. I'm excited to help you find the perfect place before your job starts on April 15th.

Based on our discussion, here's our agreed action plan:

TODAY (March 17):

- 12:00 PM: I'll email you 5 property options matching your criteria

- 2:00 PM: Please review and select your top 3 choices

- 2:15 PM: We'll have a follow-up call to discuss your selections

- 5:00 PM: Please send your pre-application documents (ID, pay stubs)

TOMORROW (March 18):

- 10:00 AM: Tours/Virtual Tour of your top choices

- 2:00 PM: Application submission for your preferred property

I've already begun researching available units in River North and West Loop within your budget range ($1,800-$2,200) that include in-unit laundry and a fitness center.

Please confirm receipt of this email and your commitment to our action plan by replying "Confirmed."

I look forward to our 2:15 PM call today!

Best regards,

Ryan Thompson

Rental Specialist

Home Easy

(555) 123-4567

Text Message Confirmation Template

Hi Sam, confirming our call and next steps: I'll send 5 Chicago properties by noon, you'll review by 2PM, then we'll discuss at 2:15PM. Please reply "Confirmed" so I know we're on the same page. Looking forward to finding your perfect place before your April 15 job start!

5. INVENTORY SELECTION AND PRIORITIZATION

5.1 Inventory Prioritization Process

Step 1: Apply the Prioritization Hierarchy

1. Highest Priority Inventory  
   * Properties with highest commission rates (100%+)
   * Quick-close options (guest card applications)
   * Minimal resistance paths
2. Second Priority Inventory  
   * Properties where onshore agents hold keys
   * Short-notice scheduling options
   * Confirmed agent availability
3. Lower Priority Inventory  
   * Properties requiring advance scheduling (2-4 days)
   * Coordination with counterparty agents
   * Limited showing availability

Step 2: Match Inventory to Client Profile

* For Direct Approval clients:
  + Focus on premium properties matching their requirements
  + Prioritize amenity-rich options
  + Consider properties with special promotions
* For Indirect Approval clients:
  + Focus on properties with flexible approval criteria
  + Prioritize buildings with history of accepting similar profiles
  + Consider properties with security deposit alternatives

Step 3: Prepare Property Presentation Package

* Curate 3-5 best options based on prioritization
* Compile key details for each property:
  + Basic information (price, bed/bath, square footage)
  + Available move-in dates
  + Special promotions or incentives
  + Approval requirements
  + Commission information (for internal use only)

5.2 Finding Alternative Inventory

When Matching Inventory Is Not Found:

Step 1: Independent Web Research

* Search Google, Apartments.com, Zillow for additional options
* Focus on areas specified by client
* Filter for properties matching client requirements

Step 2: Database Expansion

* Add newly found inventory to internal database
* Note key details and contact information
* Prioritize properties from management groups that pay commissions

Step 3: Outbound Calls to Management Companies

* Prepare script for contacting new properties:

Hello, this is [Name] from spirit realty. I have qualified renters looking for properties in your area. I noticed you have [X] units available on your website. Do you work with outside rental agencies and offer commissions?

* Negotiation tactics if they resist: lmanageralexan mountview.com
  + Note the number of empty units on their website-may movin
  + Mention competitor properties that pay commissions -
  + Emphasize the number of qualified renters you have

Step 4: Document New Inventory

* Record all communication attempts
* Document commission agreements on FUB comments. AI picks it up for inventory
* Note approval criteria and application processes
* Add contact information for future reference

5.3 Presenting Inventory Options to Clients

Professional Presentation Structure

1. Introduction
   * Brief overview of the search process
   * Summary of how options match their criteria
   * Explanation of why these properties were selected
2. Property Details Format
   * Consistent format for all properties
   * Key information presented first
   * Visual elements (photos, floor plans) when available
   * Pros and cons of each option
3. Strategic Information Order
   * Start with most promising/highest priority option
   * Present in order of likely appeal
   * End with alternatives that might stretch their criteria

Presentation Template (Text/Email - In case email, use subject)

Subject: Your Personalized Chicago Rental Options

Based on our conversation about your requirements, I've selected these top options for you:

OPTION 1: RIVER NORTH LUXURY

Address: 123 Main Street

Rent: $2,100/month

Features: 1BR/1BA, 750 sq ft, In-unit W/D, Fitness Center, Balcony

Available: April 1

Notes: This property matches all your requirements and is in your preferred neighborhood. The building has a 24-hour doorman and is 3 blocks from your new office.

Application Process: Can be completed online in 15 minutes

Virtual Tour Link: [Link]

OPTION 2: WEST LOOP MODERN

[Similar format...]

OPTION 3: RIVER NORTH CLASSIC

[Similar format...]

OPTION 4: ALTERNATIVE - GOLD COAST

[Similar format...]

OPTION 5: ALTERNATIVE - SOUTH LOOP VALUE

[Similar format...]

NEXT STEPS:

1. Please review these options and let me know your top 3 choices

2. We'll discuss your selections during our call at [Time]

3. I'll arrange virtual or in-person tours based on your preferences

Looking forward to your feedback!

Best regards,

[Your Name]

Phone Presentation Script

"I've researched several options based on your requirements, and I'd like to walk you through the top 5 choices I've found.

The first property is in River North, exactly where you wanted to be. It's priced at $2,100, which is in the middle of your budget range. What makes this property special is that it includes all your must-haves: in-unit laundry and a fitness center. It's also just 3 blocks from your new office.

The second property offers slightly more space but is at the higher end of your budget at $2,200..."

[Continue with remaining properties]

"Of these options, which ones would you like to explore further with a virtual tour or in-person showing?"

6. MANAGING SHOWING PROCEDURES

6.1 Virtual Showings via Google Meet

Setup and Preparation

* Schedule Google Meet at least 15 minutes before client appointment
* Test camera, microphone, and internet connection
* Have property details, floor plans, and neighborhood information ready
* Prepare a structured presentation plan

Conducting the Virtual Tour

1. Introduction (2-3 minutes)
   * Welcome the client and confirm they can see/hear you
   * Review the agenda for the virtual showing
   * Remind them this is an efficient way to view multiple properties quickly
2. Property Presentation (10-15 minutes per property)
   * Share screen with property images and floor plans
   * Walk through each room/area systematically
   * Highlight key features that match client requirements
   * Address potential concerns proactively
3. Q&A Period (5-10 minutes)
   * Invite specific questions about the property
   * Address any concerns or hesitations
   * Provide additional information as needed
4. Next Steps Discussion (5 minutes)
   * Guide toward application decision
   * Review application process
   * Set timeline for decision-making

Virtual Tour Script Elements

"Welcome to our virtual tour of [Property Name]. I'll be walking you through the property using photographs, floor plans, and video where available. Feel free to ask questions at any time.

Let's start with the exterior and common areas... [proceed with tour]

Now, let's look at the actual unit... This is the living room, which as you can see gets excellent natural light from the south-facing windows...

One thing you mentioned was the importance of kitchen space. Notice the generous counter space and stainless appliances here...

The bedroom can comfortably fit a queen-sized bed, as shown in this floor plan...

The bathroom features the upgraded shower you were interested in...

Now, let's talk about the neighborhood. The property is located here [show map], which puts you just 10 minutes from your workplace and 5 minutes from the grocery store and restaurants you mentioned..."

6.2 Self-Show Coordination (No Appointment Required)

Pre-Show Preparation

* Send guest card information to client and property
* Confirm property's self-show hours and procedures
* Provide detailed instructions for accessing the property
* Schedule a specific time for the self-tour

During the Self-Show

* Remain on Bluetooth call throughout the showing
* Guide the client through the property remotely:

"As you enter the unit, notice the open concept layout. On your right should be the kitchen area with the island we discussed..."

* Focus their attention on features matching their requirements
* Address questions in real-time
* Gauge their interest through conversation

Post-Show Follow-Up

* Discuss impressions immediately after the tour
* Address any concerns or questions
* Guide toward application decision if interested
* Set clear next steps:

"Based on your positive feedback, shall we proceed with the application while you're still at the property? I can start the process remotely while you're there."

6.3 Onshore Agent Coordination (Agent with Keys)

Scheduling Protocol

* Verify onshore agent availability before proposing times to client
* Coordinate at least 24 hours in advance when possible
* Confirm all details with onshore agent:
  + Property address and unit number
  + Meeting time and location
  + Client name and contact information
  + Special instructions or focus areas

Handoff Procedure

* Send introduction email connecting client and onshore agent:

Subject: Introduction: [Client Name] and [Agent Name] for Tomorrow's ShowingHi [Client Name],I'm introducing you to [Agent Name], who will be meeting you tomorrow at 2:00 PM at [Property Address] for your scheduled showing.[Agent Name] has the keys and will provide you with a tour of the property. I've briefed [him/her] on your requirements and areas of interest.You can reach [Agent Name] at [Phone Number] if needed. Please plan to arrive 5 minutes early to ensure we maximize your scheduled time.I'll follow up with you after the showing to discuss your impressions.Best regards,[Your Name]

* Create a three-way text thread for day-of coordination
* Brief onshore agent on client preferences and pain points
* Provide onshore agent with application information and closing instructions

Follow-Up Procedure

* Contact client immediately after showing
* Gather detailed feedback on the property
* Discuss next steps based on interest level
* Document all feedback in FUB

6.4 Luxury Property Showings (Agent Accompaniment with Counterparty)

Advanced Scheduling Requirements

* Schedule 2-4 days in advance
* Provide detailed client information to counterparty agent
* Confirm appointment in writing with all parties
* Send calendar invitations to all participants

Professional Presentation Guidelines

* Brief client on etiquette for luxury property showings
* Explain the role of the counterparty agent
* Prepare client with questions they should ask
* Advise on appropriate attire if applicable

Day-of Coordination

* Confirm appointment with all parties morning of showing
* Provide navigation assistance to client if needed
* Follow up with counterparty agent 1 hour before appointment
* Facilitate introductions at the property

Post-Showing Protocol

* Debrief with client privately after viewing
* Thank counterparty agent and request additional information if needed
* Document detailed property information and client feedback
* Set clear next steps based on interest level

7. CLOSING TECHNIQUES AND APPLICATION PROCESSING

7.1 Google Meet Closing Procedure

Setup and Preparation

* Call client before scheduled Google Meet time
* Remain on phone until they join the Meet
* Ensure you are in a well-lit area with professional background
* Have all application materials ready
* Prepare payment processing instructions

Professional Presentation Requirements

* Begin with a warm greeting—sign, wave, and smile
* Make eye contact with the camera
* Dress professionally
* Ensure your background is clean and appropriate

Step-by-Step Closing Process

1. Recap and Confirmation (3-5 minutes)
   * Summarize the client's requirements and preferences
   * Confirm the property selection is their preferred choice
   * Review key features and benefits of the selected property
2. Application Walk-Through (5-10 minutes)
   * Share your screen to show the application portal
   * Guide them through each section of the application
   * Explain what information is needed for each field
   * Address questions as they arise
3. Document Submission (5-10 minutes)
   * Explain required documentation
   * Show how to upload documents
   * Verify submitted documents are complete and legible
4. Payment Processing (5 minutes)
   * Guide through application fee payment
   * Explain security deposit requirements if applicable
   * Verify payment has been received before proceeding
5. Next Steps and Timeline (3-5 minutes)
   * Explain the application review process
   * Set expectations for approval timeline
   * Schedule follow-up communication
   * Outline what happens after approval

Closing Script Elements

"Now that we've completed the application and processed the payment, let me explain what happens next.

The property management will review your application over the next 24-48 hours. I'll stay in touch with them throughout this process and will update you as soon as I have any information.

Once approved, you'll receive the lease document via email, which you'll need to sign electronically within 24 hours to secure the unit.

After lease signing, you'll need to pay the security deposit of [Amount] and potentially the first month's rent of [Amount].

I've scheduled our next check-in for tomorrow at 3:00 PM to provide you with an update. Does that work for you?

In the meantime, if you have any questions or concerns, please don't hesitate to reach out to me directly at [Your Phone Number]."

7.2 Building Verification and Documentation

Application Confirmation Process

* Verify application has been received by building
* Obtain confirmation number or reference ID
* Document confirmation in FUB
* Send confirmation to client:

Subject: Application Confirmation - [Property Name]Hi [Client Name],Great news! I've confirmed that your application for [Property Address] has been received by the property management (Confirmation #12345).The typical review process takes 24-48 hours, and I'll be in touch with the leasing office throughout to ensure everything moves forward smoothly.Our next check-in call is scheduled for tomorrow at 3:00 PM, when I hope to have an update on the status for you.Please keep your phone handy in case the property needs any additional information.Best regards,[Your Name]

Payment Verification Requirements

* Obtain screenshot or receipt of payment
* Verify payment has processed successfully
* Document payment confirmation in FUB
* Store payment proof securely

Building Communication Protocol

* Contact building within 2 hours of application submission
* Confirm application has been received and is complete
* Establish point of contact for follow-up
* Schedule regular check-ins during review process

7.3 Handling Application Issues

Common Application Challenges and Solutions

When issues arise during the application process, swift and strategic intervention is crucial. Here's how to address common challenges:

| **Challenge** | **Solution Approach** | **Script Example** |
| --- | --- | --- |
| Missing documentation | Guide client to provide quickly | "I've been notified that your employment verification document is missing. Can you send that to me within the next hour so we can keep your application moving forward? The leasing office is waiting for this to continue processing." |
| Credit score issues | Suggest mitigation options | "The property has flagged your credit score as below their standard threshold. I've already spoken with them about accepting an additional security deposit of one month's rent. Would you be comfortable with this solution to secure the unit?" |
| Income verification problems | Offer alternative documentation | "The management company needs additional proof of income. Could you provide your last three bank statements showing deposits? This would give them the verification they need to move forward." |
| Rental history concerns | Address proactively | "There appears to be a gap in your rental history that's causing concern. Let's draft a brief explanation letter that addresses this and reassures the property management." |

Application Rescue Protocol

* Contact property management immediately when issues arise
* Prepare mitigation solutions before contacting client
* Present client with options rather than problems
* Set clear timeframes for resolution
* Document all communication in FUB

Escalation Path for Challenging Applications

1. First Level: Contact leasing agent directly
2. Second Level: Speak with leasing manager
3. Third Level: Contact property management company
4. Final Level: Explore alternative properties as backup

8. POST-APPLICATION FOLLOW-UP

8.1 Application Tracking and Management

Daily Follow-Up Protocol

* Contact property management every 24 hours for status updates
* Document all communication with timestamp in FUB
* Update client with progress, even if there's no significant change
* Set calendar reminders for follow-up actions

Application Status Tracking System

* Maintain a spreadsheet or FUB view of all pending applications:
  + Property name and unit number
  + Application submission date and time
  + Current status (Under Review, Pending Documents, Approved, etc.)
  + Last contact with property management
  + Last update to client
  + Next scheduled follow-up
  + Critical path items or blockers

Client Updates: Content and Cadence

* Provide updates every 24-48 hours minimum
* Update format options:
  + Brief text message for minor updates
  + Email for detailed information
  + Phone call for important developments or issues
* Always set expectations for next update

Update Email Template

Subject: Application Status Update - [Property Name]

Hi [Client Name],

I wanted to provide you with an update on your application for [Property Address].

Current Status: [Application Status]

Details: [Specific information about where the application is in the process]

Next Steps: [What happens next and approximate timeline]

Action Required: [Any actions needed from the client, if applicable]

I'll be in touch again by [specific time/date] with another update. In the meantime, please keep your phone nearby in case the property management team needs to reach you.

If you have any questions or concerns, don't hesitate to contact me.

Best regards,

[Your Name]

[Phone Number]

8.2 Deficiency Mitigation Strategies

Low Credit Score Mitigation

* Prepare standard template explaining credit circumstances:

Subject: Regarding Applicant [Client Name] - Credit ExplanationDear [Property Manager],I'm writing in reference to [Client Name]'s application for [Property Address].While the applicant's credit score is [Score], which is below your standard threshold of [Required Score], there are several mitigating factors to consider:1. The applicant has verified income of [Amount], which is [X] times the monthly rent.2. The credit issues stemmed from [brief explanation, e.g., medical bills, temporary job loss] which has since been resolved.3. The applicant is willing to provide an additional security deposit of [Amount] to mitigate any concerns.4. The applicant has a strong rental history with [X] years of on-time payments at their previous residence.Given these factors, I believe [Client Name] would be a reliable tenant. I'm available to discuss this further at your convenience.Thank you for your consideration,[Your Name]

* Coach client on speaking with property management
* Offer to join calls with property management as advocate
* Prepare alternative documentation to strengthen application

Income Verification Challenges

* Suggest alternative documentation options:
  + Bank statements showing regular deposits
  + Tax returns from previous years
  + Offer letter for new employment
  + Statements from investment or retirement accounts
  + Letter from employer confirming compensation
* Create templated explanation letters for special circumstances

Rental History Issues

* Draft professional explanation letters:

Subject: Rental History Explanation - [Client Name]Dear [Property Manager],I'm writing regarding [Client Name]'s application for [Property Address] to address the gap in rental history from [Date] to [Date].During this period, [explanation, e.g., the applicant was living with family, traveling abroad for work, owned a home, etc.]. I've attached [relevant documentation] to verify this information.The applicant has maintained excellent rental history outside of this period, including [mention positive rental references].I believe with this clarification, you'll find [Client Name] to be a qualified applicant for your property.Please contact me with any questions or for additional information.Sincerely,[Your Name]

* Provide coaching for client references
* Gather character references if helpful

8.3 Lease Generation and Review

Lease Receipt Confirmation

* Verify lease has been generated and sent to client
* Review lease details before client receives it when possible
* Confirm all terms match what was discussed (rent, move-in date, etc.)
* Alert client when lease is coming and set timeframe for review

Lease Review Guidance

* Offer to review lease with client via Google Meet
* Highlight key sections to pay attention to:
  + Rent amount and due date
  + Lease term and renewal options
  + Security deposit details
  + Maintenance responsibilities
  + Pet policies (if applicable)
  + Break lease provisions
* Answer questions about standard lease terms

Lease Signing Coordination

* Set clear timeframe for signing (typically 24-48 hours)
* Provide step-by-step instructions for electronic signing
* Confirm all required signatories are available
* Verify lease has been properly executed by all parties

Lease Confirmation Template

Subject: Lease Signing Confirmation - [Property Address]

Hi [Client Name],

Great news! I've confirmed that your lease for [Property Address] has been fully executed and processed by the property management.

Key Details:

- Move-in Date: [Date]

- Lease Term: [Term]

- Monthly Rent: $[Amount]

- Security Deposit: $[Amount]

- First Payment Due: [Date]

Next Steps:

1. The property will contact you within 24 hours to schedule your move-in appointment

2. You'll need to bring [list required items] to your move-in

3. Please plan approximately [time estimate] for the move-in process

I've attached a copy of your fully executed lease for your records.

I'll follow up with you the day before your move-in to ensure everything is on track. In the meantime, please let me know if you have any questions about the move-in process.

Congratulations on your new home!

Best regards,

[Your Name]

[Phone Number]

8.4 Move-In Coordination

Pre-Move-In Checklist

* Confirm move-in date and time with property
* Verify all payments have been processed
* Ensure client has all required documentation for move-in
* Provide detailed move-in instructions:
  + Where to go upon arrival
  + Who to ask for
  + What documents to bring
  + Payment methods accepted for any remaining fees
  + Parking information for moving vehicles

Move-In Day Support

* Send morning reminder text:

Good morning [Client Name]! Today's the big day for your move into [Property Address]. Your appointment is at [Time] with [Contact Name]. Remember to bring [critical documents/items]. I'll check in this afternoon to make sure everything went smoothly. Good luck with the move!

* Be available by phone during scheduled move-in time
* Have property management contact information readily available
* Be prepared to resolve any last-minute issues

Post-Move-In Verification

* Contact client after scheduled move-in time
* Confirm they received keys and accessed the unit
* Verify the unit condition matches expectations
* Address any immediate concerns or issues
* Document successful move-in in FUB

Move-In Confirmation Template

Subject: Move-In Confirmation and Next Steps

Hi [Client Name],

Congratulations on moving into your new home at [Property Address]! I'm glad to hear that the move-in process went smoothly.

A few important items to note:

1. Your first rent payment will be due on [Date]

2. For maintenance requests, contact [Maintenance Contact] at [Phone/Email]

3. The property management office can be reached at [Phone] during business hours

I've also attached a PDF with helpful information about your new neighborhood, including nearby amenities, restaurants, and services.

It's been a pleasure working with you to find your new home. I'd greatly appreciate if you could take a moment to provide feedback about your experience.

Please don't hesitate to contact me if you have any questions or concerns as you settle in.

Best wishes in your new home!

[Your Name]

[Phone Number]

9. DAILY REPORTING AND MEETING PREPARATION

9.1 Qualification Meeting Preparation

Pre-Meeting Data Collection

* Review all lead activity from previous day and morning
* Compile status updates for all active leads
* Prepare prioritization recommendations
* Document any system or process issues

Lead Status Report Template

* Organize leads by priority category:
  1. Ready to Apply ASAP: Leads with showings completed, ready for application
  2. High Intent/Direct Approval: Qualified leads with strong motivation
  3. High Intent/Indirect Approval: Qualified leads requiring additional steps
  4. Active Engagement: Leads in active communication but not yet ready to apply
  5. Low Priority: Leads showing minimal engagement or distant timeframes

Sample Report Format

DAILY LEAD STATUS REPORT - [DATE]

READY TO APPLY TODAY (3 LEADS):

1. Sam Johnson

- Saw River North property yesterday

- Very interested, discussing application with spouse

- Follow-up call scheduled for 1:00 PM today

- Direct approval path, credit 720

2. [Additional leads in this category...]

HIGH INTENT/DIRECT APPROVAL (5 LEADS):

1. Maria Garcia

- Moving for new job starting 4/1

- Virtual tour scheduled for 2:00 PM today

- Looking at 3 properties in West Loop

- Direct approval path, credit 690

2. [Additional leads in this category...]

[Continue with other categories...]

PRIORITY RECOMMENDATIONS:

1. Focus on Sam Johnson and Emily Wilson for immediate applications

2. Schedule afternoon call block for virtual tours with high intent leads

3. Deprioritize leads with move dates beyond 60 days

ISSUES REQUIRING ATTENTION:

1. Limited inventory in South Loop under $1,800

2. System outage affected response time for 2 leads yesterday

Meeting Participation Guidelines

* Present lead status report concisely (2-3 minutes)
* Focus on actionable insights rather than comprehensive details
* Highlight success stories and challenges
* Be prepared to discuss specific action plans for priority leads

9.2 Afternoon Meeting/Report Preparation

Performance Metrics Compilation

* Track progress against morning action plans
* Document completed applications
* Note lead status changes since morning meeting
* Calculate conversion rates and response times

Afternoon Progress Report Template

AFTERNOON PROGRESS REPORT - [DATE]

APPLICATIONS COMPLETED (2):

1. Sam Johnson - River North Luxury, $2,100

- Direct approval path, strong credit

- Application submitted at 2:15 PM

- All documentation received, payment confirmed

2. [Additional applications...]

VIRTUAL TOURS COMPLETED (4):

1. Maria Garcia - 3 properties shown

- Strongly interested in West Loop Modern

- Planning to apply tomorrow morning

- Action plan confirmed and documented

2. [Additional tour details...]

PROGRESS ON MORNING PRIORITIES:

- 80% of high-priority leads engaged (8/10)

- 40% conversion to application or scheduled showing (4/10)

- Two leads rescheduled for tomorrow

- One lead disqualified due to budget constraints

CHALLENGES ENCOUNTERED:

- Limited availability for in-person showings in River North

- System delays affecting document uploads

- One high-priority lead unresponsive since morning

PLAN FOR TOMORROW:

- Follow up on pending applications by 10:00 AM

- Focus on converting today's virtual tours to applications

- Address inventory challenges in South Loop

Meeting Participation Guidelines

* Present metrics and outcomes objectively
* Accept accountability for any missed targets
* Provide logical explanations for challenges
* Propose solutions for identified issues

9.3 Performance Tracking and Self-Assessment

Daily Performance Scorecard

* Track key metrics against personal and team targets:
  + Response time average
  + Calls completed
  + Emails/texts sent
  + Applications processed
  + Conversion rate
  + Follow-up completion rate

Self-Assessment Questions

* Daily reflection points:
  1. Which leads did I move forward effectively today?
  2. Where did I miss opportunities for advancement?
  3. Did I maintain the required sense of urgency?
  4. Did I follow the Trust & Accountability framework?
  5. Where could I improve my Socratic selling approach?
  6. Did I properly externalize pressure when appropriate?

Continuous Improvement Actions

* Review successful interactions for repeatable elements
* Analyze unsuccessful interactions for improvement areas
* Document best practices and personal learnings
* Identify skill gaps requiring additional training or support

10. HANDLING COMMON OBJECTIONS AND CHALLENGES

10.1 Price and Budget Objections

Objection Recognition and Response Framework

| Objection | Response Strategy | Script Example |
| --- | --- | --- |
| "It's more than I wanted to spend" | Value justification | "I understand budget concerns. Let's look at the total value: you're getting in-unit laundry, which saves $75/month in laundromat costs, and the included fitness center saves another $60/month in gym fees. When we factor these in, the effective cost is actually closer to your target." |
| "I found cheaper options online" | Quality comparison | "That's helpful information. Could you share which properties you found? Often, there are important differences in amenities, location, or approval requirements that explain the price difference. Let's compare to make sure you're getting the best overall value." |
| "I need to think about it" | Create urgency with facts | "I completely understand wanting to consider this carefully. Just so you're aware, this building typically processes 3-5 applications daily, and I've seen similar units get multiple applications within hours. Would it be helpful if I put in a courtesy hold while you're thinking?" |
| "Can we negotiate the rent?" | Offer alternatives | "While the base rent is set by the property management, there may be other areas where we can find value. Some buildings offer concessions like reduced security deposits or free parking instead of rent reductions. Would you like me to explore these options?" |

Budget Recalibration Techniques

* Start with exploratory questions about market knowledge
* Present current market data objectively
* Offer constructive alternatives:
  + Different neighborhoods with lower price points
  + Adjusting unit size or amenity requirements
  + Flexible lease terms or move-in dates
  + Special promotions or concessions

10.2 Hesitation and Indecision

Indecision Root Cause Analysis

| **Root Cause** | **Identification Clues** | **Resolution Approach** |
| --- | --- | --- |
| Fear of making wrong choice | Questions about multiple properties, repeated comparisons | Provide decision matrix, emphasize flexible lease terms or satisfaction guarantees |
| Waiting for another person's input | "I need to check with my spouse/roommate" | Offer to schedule joint call, provide shareable information package |
| Unclear priorities | Changing requirements, unfocused feedback | Use priority assessment tool, focus on must-haves vs. nice-to-haves |
| Market uncertainty | Questions about "better deals" or "more options" | Provide market comparisons, emphasize scarcity of current options |

Decision Acceleration Techniques

* Create simple decision frameworks:

"Let's rate each property on a scale of 1-5 for your three most important criteria: location, space, and amenities."

* Use constructive time pressure:

"The application review usually takes 2-3 days, and your target move-in date is just 2 weeks away. Working backwards, we should ideally submit an application by tomorrow to ensure everything processes in time."

* Reduce psychological barriers:

"The application fee is fully refundable if you're not approved, so there's no financial risk in applying now to secure your spot in line."

10.3 Showing Resistance

Virtual Tour Resistance

* Acknowledge preference for in-person viewing
* Emphasize benefits of virtual first approach:

"I completely understand wanting to see properties in person. Many clients find that starting with virtual tours helps them narrow down options efficiently, saving time by only visiting their top choices in person. We can schedule in-person viewings for your favorites after the virtual tour."

* Provide enhanced virtual experience:
  + High-quality photos and videos
  + Interactive floor plans
  + Neighborhood virtual tours
  + Live video walkthrough options

In-Person Scheduling Challenges

* Offer alternative viewing times
* Suggest weekday evenings or early mornings
* Propose splitting viewings
* Coordinate with onshore agents for maximum flexibility

Building Access Limitations

* Prepare clients for security procedures
* Provide clear instructions for access
* Coordinate with building security in advance
* Have backup contact information readily available

10.4 Application Hesitation

Common Application Concerns and Responses

| **Concern** | **Response Approach** | **Script Example** |
| --- | --- | --- |
| Privacy concerns | Explain security measures | "I understand your concern about sharing sensitive information. The application portal uses bank-level encryption, and your data is protected under strict privacy policies. Would it help if I walked you through exactly how your information is used and protected?" |
| Multiple application fees | Explain the process value | "I understand the concern about application fees for multiple properties. That's why I recommend we focus on your top choice first. The fee covers the cost of background and credit checks, which are necessary for the property to make an informed decision. If we need to apply elsewhere, I'll work to expedite the process to minimize additional fees." |
| Fear of rejection | Provide pre-screening confidence | "Based on the pre-screening we've done, your qualifications align well with this property's requirements. While I can't guarantee approval, I wouldn't recommend applying if I didn't think you had a strong chance. If any issues arise, I'll work directly with the property management to address them." |
| Commitment anxiety | Clarify the process timeline | "Submitting an application doesn't commit you to taking the unit immediately. It secures your place in line and starts the approval process. Once approved, you'll typically have 24-48 hours to review and sign the lease. This gives you time to make your final decision while ensuring you don't lose the opportunity." |

Application Process Simplification

* Break the process into manageable steps
* Offer to complete sections that don't require personal information
* Provide clear checklists for required documentation
* Set up screen sharing to guide through complex sections

11. TOOLS AND RESOURCES

11.1 Essential System Access and Setup

FUB System (Follow-Up Boss)

* Login procedure and credential management
* Dashboard navigation and customization
* Lead management views and filters
* Task tracking and reminder setup
* Note templates and usage
* Email and text integration

Communication Tools

* Open Phone system setup and features
* Text messaging platform
* Email templates and signature setup
* WhatsApp groups and protocols
* Google Meet configuration

Calendar and Scheduling

* Google Calendar/Calendly setup
* Appointment scheduling best practices
* Calendar sharing protocols
* Reminder and notification settings

Document Management

* Secure document storage procedures
* Template library access
* Document sharing protocols
* Electronic signature system

11.2 Template Library (Given earlier, add more)

Email Templates

* Initial contact
* Property options presentation
* Action plan confirmation
* Application follow-up
* Building communication
* Deficiency mitigation
* Lease confirmation
* Move-in coordination

Text Message Templates

* Quick response
* Appointment confirmation
* Document request
* Status update
* Urgent notification

Call Scripts

* Initial qualification
* Virtual tour
* Objection handling
* Application walk-through
* Lease review

Documentation Templates

* Credit explanation letters
* Income verification requests
* Rental history clarification
* Co-signer requests

11.3 Reference Materials

Market Data Resources (To be provided by research team)

* Rental rate averages by neighborhood
* Amenity value estimates
* Seasonality trends
* Approval criteria by building

Building Information Library

* Property management contacts
* Application requirements by building
* Commission structure information
* Known approval flexibilities
* Amenity details and floor plans

Troubleshooting Guides (To be provided by automation team)

* Application system issues
* Document upload problems
* Payment processing errors
* System access challenges

Escalation Contact List (To be provided by Research Team)

* Internal support contacts
* Building management contacts
* Emergency assistance resources
* Technical support information

CONCLUSION

This comprehensive guide provides the foundation for successful remote sales outsourcing operations. By following these detailed procedures and leveraging the provided resources, sales representatives can achieve high-velocity, fact-based conversions while maintaining the trust and accountability principles that drive our business.

Remember the core principles that should guide every interaction:

* **Say it. Do it.** - Follow through on every commitment
* **Extract statements; don't make them** - Use Socratic selling
* **The end is at the beginning** - Establish closing goals upfront
* **Time is the enemy** - Move swiftly through the process
* **Only the paranoid survive** - Maintain vigilance with follow-ups

Success in this role comes from mastering the processes outlined in this guide while maintaining a client-focused, solution-oriented approach. With consistent application of these techniques and continuous improvement, you will excel in delivering exceptional results for Home Easy clients.