POLICY FORM PRESALES POLICIES AND PROCEDURE

Presales Sections: Tracking our schedules and converting them to visits

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PURPOSE:

At No-Broker, our fundamental principle is to streamline the property buying experience by eliminating brokers and providing direct access to property seekers and owners. Our presales vertical plays a critical role in engaging potential buyers, scheduling visits, and converting interest into tangible site visits. This policy outlines the procedures and guidelines to ensure efficient tracking of schedules and maximizing conversions in alignment with No-Broker's ideology of transparency, efficiency, and customer-centricity.

POLICY STATEMENT

The presales department at No-Broker is committed to effectively tracking scheduled appointments and converting them into site visits. This policy establishes standardized procedures, roles, and responsibilities to enhance operational efficiency, improve customer satisfaction, and achieve high conversion rates.

SCOPE

This policy applies to all employees within the presales department of No-Broker, including Relationship Managers (RMs) and support staff involved in scheduling and converting appointments to site visits. It encompasses activities related to lead generation, appointment scheduling, client engagement, site visit management, and follow-up processes.

RESPONSIBILITIES

- **Presales Head:**
  - Oversee the implementation and adherence to the policy.
  - Provide guidance and support to the Relationship Manager (RM) team.
  - Monitor performance metrics and report to the Vertical Head.
- **Relationship Managers (RMs):**
  - Schedule appointments promptly and accurately using CRM tools.
  - Engage with clients to confirm appointments and provide necessary information.
  - Conduct site visits professionally and ensure client satisfaction.
- **Support Staff:**
  - Assist RMs in scheduling appointments and managing client inquiries.
  - Provide administrative support to ensure smooth operation of scheduling and visit management.

DEFINITIONS

- **Scheduled Appointment:** A confirmed time and date for a client to visit a property.
- **Site Visit:** Physical inspection of a property by a client facilitated by a No-Broker representative.
- **Conversion Rate:** Percentage of scheduled appointments that result in actual site visits.

PROCEDURE

1. Appointment Scheduling

- **Capture Client Details:**
  - Ensure all relevant client details (name, contact information, property interest, preferred visit time) are accurately recorded in the CRM system.
  - Verify the accuracy of the information with the client to prevent errors.
- **Schedule Appointment:**
  - Use the CRM system to schedule appointments based on the client's availability and preferences.
  - Ensure that all scheduled appointments are entered into the system in real-time.
- **Automated Confirmation:**
  - Send an automated confirmation email or SMS to the client immediately after scheduling the appointment.
  - Include the date, time, location, and any additional details required for the visit.

2. Pre-Visit Engagement

- **Reminder Notifications:**
  - Send reminder notifications (email/SMS) to clients 24 hours and 2 hours before the scheduled appointment.
  - Ensure reminders include essential details such as the appointment time, location, and contact information for any queries.
- **Personal Follow-Up:**
  - Sales representatives should personally follow up with clients 24 hours before the appointment to confirm attendance and address any last-minute questions or concerns.
- **Preparation for Visit:**
  - Ensure that all necessary arrangements for the site visit (e.g., availability of site staff, prepared property) are made in advance.
  - Provide clients with clear directions and any logistical information needed for a smooth visit.

3. Day of Appointment

- **On-the-Day Confirmation:**
  - Make a confirmation call to the client on the morning of the appointment to reconfirm attendance.
  - Provide any additional last-minute instructions or assistance.
- **Prepare Welcome Kit:**
  - Prepare a welcome kit for the client, including property brochures, contact information, and any promotional materials.
- **Assign Staff:**
  - Assign a dedicated staff member to greet the client upon arrival and guide them through the visit.
  - Ensure the staff member is well-informed about the client's preferences and requirements.

4. Conducting the Site Visit

- **Warm Welcome:**
  - Ensure the client is warmly welcomed upon arrival and offered any necessary refreshments or amenities.
  - Reiterate the key points of interest and provide a brief overview of the visit itinerary.
- **Engage and Inform:**
  - Provide a comprehensive tour of the property, highlighting key features and benefits.
  - Answer all client questions and provide additional information as needed.
- **Gather Feedback:**
  - Collect immediate feedback from the client at the end of the visit.
  - Note any concerns or preferences expressed by the client for follow-up.

5. Post-Visit Follow-Up

- **Immediate Follow-Up:**
  - Send a thank-you email or SMS to the client within 24 hours of the visit, expressing appreciation for their time and interest.
  - Include a brief summary of the key points discussed during the visit.
- **Detailed Follow-Up:**
  - Conduct a detailed follow-up call within 48 hours to address any additional questions, provide further information, and discuss next steps.
  - Reiterate the key benefits of the property and seek to move the client towards the next stage of the sales process.
- **Update CRM System:**
  - Update the CRM system with all relevant details from the site visit and follow-up interactions.
  - Ensure that all client feedback, preferences, and next steps are accurately recorded.

GUIDELINES

- **Consistency:**
  - Ensure that all steps in the procedure are consistently followed for every scheduled appointment.
  - Use standardized templates and scripts for communications to maintain consistency in messaging.
- **Customer-Centric Approach:**
  - Prioritize the client's convenience and preferences at every stage of the process.
  - Be responsive to client inquiries and proactive in providing assistance.
- **Efficiency:**
  - Utilize CRM automation tools to streamline scheduling, reminders, and follow-ups.
  - Ensure that all team members are trained on the CRM system and the established procedures.
- **Quality Assurance:**
  - Conduct regular audits of the scheduling and visit conversion process to identify areas for improvement.
  - Use client feedback to continuously refine and enhance the process.
- **Training and Development:**
  - Provide ongoing training for sales representatives on effective communication, customer engagement, and conversion techniques.
  - Encourage knowledge sharing and best practice dissemination among team members.

EMPLOYEE EVALUATION

- **Conversion Rate:**
  - RMs are evaluated based on their ability to convert scheduled appointments into site visits.
  - Regular analysis of performance data will be conducted to identify trends, strengths, and areas requiring improvement.
- **Targets:**
  - Individual targets will be set for RMs to achieve a conversion rate of over 60% from scheduled appointments to site visits.
  - Clear and measurable goals will be established in alignment with overall team objectives.
- **Incentives:**
  - Opportunities for career advancement within different verticals will be available to extraordinary RMs who demonstrate consistent exceptional performance. This allows for broader career growth and development within No-Broker.
  - During promotion cycles, high-performing RMs can expect greater salary hikes and recognition for their outstanding performance.

    - A competitive yet collaborative environment will be encouraged to drive overall performance improvement.
- **Penalties:**
    - RMs failing to meet performance targets over an extended period may receive minimal or no bonus incentives.
    - During promotion cycles, RMs with sustained poor performance may receive reduced or no salary hikes or promotions until performance benchmarks are met consistently.
    - Progress will be closely monitored, and if necessary, further action will be taken, including reassignment to different roles or other disciplinary measures.
    - Persistent failure to meet performance standards may result in probation or termination, reflecting the critical nature of performance in the real estate sector.

CODE OF CONDUCT

As an employee of No-Broker, you are expected to hold yourself to our standards of conduct. Keep in mind that while employed with No-Broker, you represent this organization anytime you interact with a customer and/or fellow employee, including posting content that a customer and/or fellow employee may observe online. Employees should be aware of the effect their actions may have on their personal images, as well as on No-Broker's image.

- **Harassment Policy:** At No-Broker, we do not tolerate neglect or mistreatment of clients based on age, race, ethnicity, disability, religion, or sexual orientation. Harassment or bullying of clients or employees, including sexual harassment, is strictly prohibited. Report any incidents to your supervisor, their manager, or higher executives. We prioritize a professional, safe workplace and promptly investigate all complaints."
- **Dress Code / Personal Appearance:** No-Broker salesforce must dress in business casual attire, ensuring a neat, tasteful appearance. As your role involves customer interactions, this positively impacts both your and No-Broker's image. Feel free to exceed the minimum standard.
- **Smoke, Drug, Alcohol, and Weapons-Free:** No-Broker maintains a strict smoke, drug, alcohol, and weapons-free policy. Smoking and alcohol consumption are prohibited on our premises. Off-premises drug use is also prohibited and may be monitored through drug testing. Weapons are banned from all No-Broker properties. Violations, including during client meetings, will result in immediate termination.

Revision History

Revision	Date	Description of changes	Requested By
0.0	26/06/2024	Initial Release	