

# REAL ESTATE FAST TRACK

## Buyer Transaction and Relationship Timeline

When	Action	Done?
First Contact	Qualification Dialogue. OWN THE OPENING by <i>immediately</i> offering value. Ask open-ended questions and dig deep to get to the WHY of their move. Avoid the two deadly questions: 1) Instead of asking "Are you working with anyone?", ask "How may I help you?" and, 2) Instead of asking "Are you pre-approved?", ask "How much has a lender told you you're pre-approved for?"	
Immediately after first contact	<ol style="list-style-type: none"> <li>1) Video (SMS or email) OR handwritten note – agent choice. Reiterate key points, say "thank you" for the opportunity to serve.</li> <li>2) Send Buyer or Seller Item of Value (physical) and Client Appreciation Program Flyer</li> <li>3) Set up drip on MLS</li> <li>4) Add to CRM (COMPLETE ENTRIES)</li> </ol>	
Ongoing	Frequent contact throughout showings. Reiterate goals at showings, search yourself for other homes which may be a fit. CHECK INS WEEKLY if not actively showing.	
At acceptance	<ol style="list-style-type: none"> <li>1) Call (do not text – be EXCITED!) and inform client of the great news!</li> <li>2) Record video explaining next steps and what to expect.</li> <li>3) Sent a congratulations note to current address.</li> <li>4) Lisa will prep and email contingency deadlines letter.</li> </ol>	
Acceptance +2 days	Deliver moving kit to client's home (contains 5 boxes, 2 sharpies, a roll of TOG tape, and a USPS change of address kit.	
After appraisal	Send \$5 coffee card to client with note – "We're past the last major hurdle – a jolt of caffeine should help us push through to a strong finish!"	
5 days before COE	<ol style="list-style-type: none"> <li>1) Automatic Utilities Email</li> <li>2) Call and confirm walkthrough, signing, and move-in</li> </ol>	
Signing	Attend signing, reconfirm move-in, and deliver Closing Gift OR put it in the house if you won't be transferring keys at the property. Make sure walkway is swept and there's toilet paper in the bathrooms. Take photo of clients outside home with SOLD sign and send to them for social media.	
Move-in Day	Deliver late lunch – pizza, Port of Subs, something else you think your client will like.	
Move-in + 7	Check in call: How is everything going? Ask if they need referrals to a service provider, remind about HW, ask for review	
Move-in + 30	Video (Email or SMS) or handwritten note: Hope everything is going great! Double check that everything works, is as expected, offer a referral to service provider, ask for a referral	
After	Holiday cards, merry pop-ins, Client Appreciation Party invites, anniversary cards, Home anniversary gift, Market insights, e-report, birthday cards, life events, referrals.	