

Overall Best Practices for Experts



Respond quickly

Speed to lead! If you're not responding within the first five minutes, the likelihood of conversion drops dramatically. If you're often on the phone or in appointments when inquiries come through, keep text message templates on your phone in the "Notes" app to send out right away.



Anticipate client wishes rather than just responding to them

Asking the client "How can I help you?" or "What questions can I answer?" gives the consumer control of the conversation and undercuts the value you bring. You know exactly how you can help them! Steer the conversation to secure an appointment, define your role, handle objections, and answer any pressing questions.



Share information with clients — the more the better

It's always safe to assume that the buyer isn't completely aware of how the homebuying process works. Approach every conversation ready to educate. Demonstrate value, build trust, and establish rapport by sharing information the consumer is likely not aware of.



Completely *nail* your hellos and goodbyes

Clients remember the first and last minutes of a service encounter more vividly — and for longer — than the rest of it. Have a strong and friendly intro where you open with your name and brokerage. At the close of your conversation, repeat your information again and let the client know you will follow up with an e-mail or text confirmation. This should include the details for your appointment and all your contact information.



Strive to remember — and acknowledge — each client in a personal manner

Show that you care by remembering details about them, their family, and what they are interested in. Seek to understand their “why” — Why this building? This neighborhood? Why now? If not now, when? Find out their bottom line and ideal timeline for purchase.



Set your own standards

Don't sell yourself short by benchmarking your service level against the prevailing standards of your brokerage, team, or program. Focus on establishing yourself as a top Expert by adopting best practices, communicating with your Business Advisor regularly, and approaching each conversation with a customer-first mindset. Having your own set of service standards will continue to set you apart and keep you well on your way to your next transaction.
