

*Lead Generation*  
*36:12:3*

*Power Session 10:*  
*Lead Conversion*

Linda Warren

An “Essential” for Growing Your Business

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# *Power Session 10: Lead Conversion*

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# *Power Session 10: Lead Conversion*

## **In this Power Session ...**

- [1]** *What Is Lead Conversion?*
- [2]** *Get to Know Your Leads*
- [3]** *Tips for Getting an Appointment*
- [4]** *Getting the Most from Internet Inquiries*
- [5]** *Consultation Prequalification*
- [6]** *Classify Your Leads*
- [7]** *Putting It All Together*

Notes

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# *Introduction*

## Ground Rules

1. Arrive to class on time and return promptly from breaks.
2. Move quickly when you are instructed to form small groups or partner with someone to role-play.
3. Limit your side conversations.
4. Turn your cell phones and pagers to vibrate or OFF.
5. Feel free to stand and walk around if you find yourself getting tired.
6. Accept the reality of time and participation.
7. Respect the different learning styles and opinions of others.
8. Help each other learn. None of us is as smart as all of us working together to improve our skills and knowledge.
9. Consider everything we do in class confidential. What is discussed and role-played behind closed doors *stays* behind closed doors.
10. Have fun!

# How You Will Learn

## Learning Methods

1. In this manual, you will find:
  - **Models and systems** that are tested and proven ways of accomplishing Big Goals.
  - **Exercises and discussion** that allow you to test new skills and clarify your thinking in a safe environment.
  - **Stories, lessons learned, anecdotes, and advice** from top agents who offer invaluable insights.
2. Your classroom learning experience will be enhanced by:
  - **PowerPoint slides** to help keep you on track with the topics inside the course manual.
  - **KWConnect videos** to enrich your understanding of the course material. Watch for the camera icon in your course materials.
  - **Your classmates and instructor.** Don't underestimate the value of what you can learn from your peers, who ask great questions, who share their experiences, and who participate in exercises with you.



## Accountability Methods

Accountability is, in the KW experience, the most crucial part of goal achievement. To support your goal setting, we recommend you:

1. Develop a Lead Generation Action Plan. At the end of this course, you will create a plan that outlines the specific actions you will take to achieve your lead generation goals. You will also create a calendar that helps you schedule your specific activities into your daily 3 hours of lead generation time.
2. Select an accountability partner or program to help you measure, evaluate, and make adjustments to your Action Plan. Look to the following resources for an accountability relationship:



- KW MAPS Institute individual and group coaching
- Market Center Productivity Coach
- Team Leader
- ALC Members
- Peers



## Where You Are Today

Where are you today with your lead generation efforts? Get into the habit of taking accountability for your actions and your progress. Take time to share with your instructor and your peers your aha's, your challenges, and your next steps.

**Directions:**

1. List the lead generation activities you completed during the last 24 hours.
2. What were your aha's?
3. What were your challenges?
4. Discuss what you will do differently in the next 24 hours.

**Time:** 10 minutes

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	<u>Time Spent on Activity</u>
1. Lead Generation Activities:	
2. My aha's from these activities:	
3. The most difficult part of these activities:	
4. What I will do differently in the next 24 hours:	

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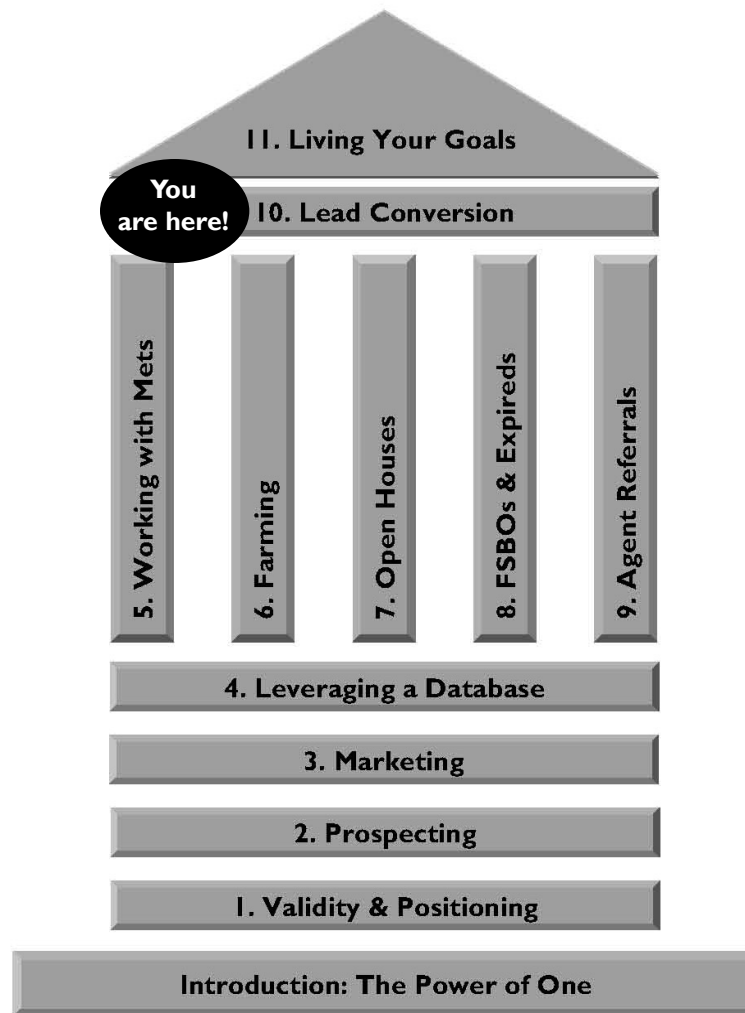
## Why You Are Here

*“In the end,  
all that matters  
is how many  
appointments you  
set up.”*

We all know how important it is to generate leads. It’s your number one focus. However, your critical activity doesn’t stop with generating the lead. You must convert your leads to appointments. In this Power Session, you’ll learn ways to increase the number of appointments you get. Sometimes you don’t get an appointment right away, and that’s okay. You’ll learn how to evaluate your prospects to determine how quickly they’ll do business with you. You want to invest your face-to-face time with customers who are ready, willing, and able to buy or sell with you now. You want to nurture all of your relationships, come from contribution, demonstrate your value, and maximize your number of appointments. Before you know it, you’ll be an expert at this!

BOB GUEST  
THE BOB GUEST TEAM  
AUSTIN, TEXAS

### Lead Generation 36:12:3 Course Map



## Learn How to Convert More Leads

*Read, underline, and share ...*

Gene Rivers, a high-producing agent in Tallahassee, Florida, says the real issue is that you must get appointments. “We all know that three-quarters of sellers make only one phone call and 65 percent of buyers work with the first agent they have significant contact with. So the real estate business is truly about getting appointments.”

**S**teve Gutstein is the Managing Consultant of Team Gutstein in Andover, Massachusetts. Part of Steve’s success comes from his ability to convert leads to appointments. Steve chooses his words very carefully to make his leads feel comfortable. He uses words and phrases like “invite,” “free,” and “no obligation” to keep them from feeling pressured. His script goes, “I would like to invite you to meet with me for a free, no obligation consultation, at my office, that will last about 45 minutes. At that time, I will take you through the home selling (or buying) process, I will get familiar with your expectations and your goals, and I will give you the opportunity to be comfortable with my team so we can represent you—is that okay with you?” Then he suggests some meeting times that work well with his schedule.



He structures his invitation to

1. Explain what he hopes to accomplish in what time frame
2. Use a trial close (“so we can represent you”)
3. Ask for their approval

This structure is effective because it provides clarity for the potential customer and seeks agreement before moving through any delays, objections, or resistance to the next stage. Even if you prefer to use your own language, you can adopt his structure to get agreement from leads.

## What Will Make This a Great Training Experience

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# *What Is Lead Conversion?*

One of the difficulties in talking about *lead conversion* is that people mean different things by both words. Some people will tell you a lead is anyone they've met. Others will tell you no one is a lead until they meet certain criteria. So what is the answer? As Gary Keller says, a lead is someone who is ready, willing, and able to do business *now*.

Similarly, when some real estate agents cite their conversion statistics, they are tracking from first contact until the sale is closed. Others consider all of the steps along the way to be individual conversions. In order to monitor your business you need to know multiple conversion rates. In this Power Session, we focus on converting leads to appointments. Other Keller Williams University courses deal with converting appointments to signed representation agreements and agreements to closings.

For this Power Session, we are focusing on getting appointments with people who are ready, willing, and able to buy or sell real estate now—either people you've newly met or ones you've been contacting for a long time. We'll also cover questions to prequalify your leads for buyer and seller consultations. Knowing something about your lead will help you conduct a more effective consultation, which in turn will help you get more listing agreements and buyer representation agreements.

*“The most productive lead converters stay focused on finding and determining those who are ready, willing, and able to work with them now.”*

DAVE JENKS  
KWU MASTER FACULTY  
KELLER WILLIAMS REALTY,  
INC.  
WHITE PLAINS, NEW YORK

Notes

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# Get to Know Your Leads

## Be Personable

### Truth

**You are auditioning for the chance to be a representative for home buyers and sellers—you have to gauge their personality and match it.**

Whether you are conversing by phone or in person, you want to gather as much information from your contacts as possible. You can use a lead sheet to remind you of questions you want to ask. If you work from a list of questions, be sure to keep the experience as individualized and personal as possible. As Mike Mendoza of Phoenix, Arizona, says, this is a conversation, not an inquisition. Often *how* you ask (using a conversational style) is as important as *what* you ask.

In the Brenkus Team's MREA Masters DVD, Teri Brenkus advises agents not to be too formal when talking to a lead over the phone—be friendly, be relaxed, and “be their best friend.” This approach allows you to build rapport and size up your prospective customer.

## Understand Behavioral Profiles

As a Keller Williams Realty real estate agent, you are likely familiar with the DISC behavioral assessment that is often used during the recruiting process and as a tool for team building. While we all know that people are complex and have many traits, the DISC assessment is useful in categorizing people by their one or two predominant behavioral traits. The acronym D-I-S-C stands for Dominance, Influence, Steadiness, and Compliance.

Once you understand a person's behavioral profile, you can treat them the way they want to be treated, thereby increasing your odds of demonstrating that you can meet their needs, and convert them to a customer.

This Power Session introduces you to basic characteristics associated with four major behavioral styles. To become an expert on identifying and working well with a variety of people according to their behavioral preferences and strengths, take the KWU Recruit-Select course.

**I: Influence**

**What do influencing people want?**

- To talk a lot while you listen
- To persuade
- Opportunity for social involvement
- To know about entertaining in the home

**How should you interact with influencing people?**

- Be fun and enthusiastic.
- Spend time developing the relationship (ask about them).
- Emphasize who you know.
- Pay attention to social boundaries.
- Use conversational scripts.

Bottom Line:

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**D: Dominance**

**What do dominant people want?**

- To conquer, control, and win
- To know the bottom line (numbers and money)
- To have you listen while they talk

**How should you interact with dominant people?**

- Let them know that you realize their time is valuable.
- Help them go through the home-buying process as quickly as possible.
- Use scripts to communicate effectively.
- Give them options and let the buyers select which choice is best for them.

Bottom Line:

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**S: Steadiness**

**What do steady people want?**

- Assurance
- Stability
- To feel safe
- To belong

**How should you interact with steady people?**

- Allow plenty of time for them to make decisions.
- Communicate frequently.
- Let them know how much you care about them and their family.
- Provide all the information they need (especially facts and statistics).

Bottom Line:

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**C: Compliance**

**What do compliant or detail-oriented people want?**

- To know lots of facts and details
- To avoid conflict
- To avoid mistakes
- Time to think

**How should you interact with detail-oriented, compliant people?**

- Provide as much information as you can (especially facts and statistics).
- Appeal to their sense of logic.
- Give them time to think.
- Be prepared and on time for every appointment.

Bottom Line:

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## Build Rapport

We talk a lot about building rapport. Why do we want to build rapport? Because when we ask questions, it demonstrates that we are interested in people. While there are many ways to learn about people, one technique we use fairly often (and cover in other Power Sessions) is F.O.R.D., asking about

**F** \_\_\_\_\_

**O** \_\_\_\_\_

**R** \_\_\_\_\_

**D** \_\_\_\_\_

Learning about a person is just the first part of what you need to do. Beyond that, you need to sell your services in a way that is meaningful to the person you are talking to.

**W**hen she was working as an agent, Dianna Kokoszka, vice president of MAPS Institute at Keller Williams Realty Intl., always asked about a person's occupation. She used that knowledge to create a scenario that her lead could relate to. Dianna often found it necessary to help her potential customers understand the value of her experience and expertise.



Dianna recalls a time when she was trying to get an appointment with a policeman who had a friend that was new in the real estate business and the officer was leaning toward working with his friend. Dianna said, "If you were in a shoot out, who would you rather be with, a rookie or someone who has been in 200 shoot outs before and knows what can happen and what can go wrong?" The officer let Dianna know that his life was not at stake when buying a house. Dianna replied, "No, but your financial future is." The officer signed a contract with her pretty quickly.

Similarly, Dianna used this technique to relate to school teachers: "Have you ever had a student and they just weren't getting it?" She could also relate to doctors and nurses: "If you don't watch the vital signs, what will happen to your patient?" The response is that something bad could happen. Then Dianna would let her potential seller know that she watches vital signs in the market and that is important because if an agent doesn't watch the vital signs, a house could sit on the market a long time without selling.

Use what you learn about a person and talk to them in terms they understand.

Tony DiCello, director of MAPS Institute coaching, recommends putting people at ease and building trust by matching their conversational speed and tonality.

Notes

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# Tips for Getting an Appointment

Jaymes Willoughby, an agent in Austin, Texas, with 225 transactions in 2006, says, “The problem is not just getting the lead. A big question is, what are you going to do with the lead?” Your conversion ratio is a critical part of your success in business.

## 10 Tips for Getting an Appointment

1. Ask for the appointment.
2. Be an expert in your market.
3. Be confident in your ability.
4. Have a list of questions and ask them.
5. Listen.
6. Come from contribution.
7. Begin with the end in mind.
8. Seek agreement.
9. Respond quickly.
10. Communicate in person.

### I. Ask for the appointment

This may seem obvious, but you have to ask for it. Beyond that, as Gary Keller says, you must ask directly, not indirectly or casually.

It is amazing how often agents are afraid to ask for an appointment. When you start a conversation, you don't have an appointment, so you have nothing to lose. The worst thing that can happen is that at the end of the conversation you still don't have an appointment. If you don't ask for the appointment, you risk not getting it. Dianna Kokoszka's rule of thumb is that when you get a “no,” you continue asking a minimum of five times (or keep asking until you get it or they ask you to stop). What's the “take-away” message here? Don't give up! Remember, a “no” the first time you ask merely means “not yet.” People will eventually say “yes” when they appreciate your competence.

In general, people are more likely to agree to an appointment if you explain the benefit to them. For example, prospects are more likely to agree to come to your office for a buyer consultation when they understand that doing so could allow them to preview a lot of properties and ultimately save time in their home search process.

*“Once you believe  
it's okay to ask for  
what you want, you  
will have a chance of  
getting it.”*

GARY KELLER  
CO-FOUNDER AND CHAIRMAN  
KELLER WILLIAMS REALTY,  
INT'L  
AUSTIN, TEXAS

## 2. Be an expert in your market

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You should know your market better than anyone else. Your expertise will persuade leads that you are the best agent to represent them and care for their needs. How do you get to be an expert in your market? Get out there and be in the market. Network with people who know what is going on—bankers, appraisers, influential people in the community, other real estate agents, builders, and service providers, to name a few. Preview houses so you become an expert on the inventory. Do market analyses to know how long properties are on the market, which properties are selling, and for how much (know your statistics). Be familiar with the schools. Know who can provide high quality services for buyers and sellers (e.g., lenders, inspectors, repairmen, etc.). In general, study the Multiple Listing Service (MLS) numbers.

*“Be very  
enthusiastic  
and very  
knowledgeable!*

*There is no better  
combination!”*

RICK GEHA  
THE RICK GEHA AND COCO  
LEWIS REAL ESTATE GROUP  
FREMONT, CALIFORNIA

## 3. Be confident in your ability

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What builds confidence? There are a number of things you can do:

- Practice scripts
- Practice handling objections
- Role-play
- Get training
- Get a MAPS coach
- Say affirmations

## 4. Have a list of questions and ask them

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Sometimes, we work so hard to *get* leads, we don't always know what to do with them once we've got them. Jean Grubb, a veteran agent from Austin, Texas, recommends, “As soon as you get a lead from someone wanting to buy or list a house, you need a system that tells you what you need to do and what steps you need to perform.” The best system for keeping you on track at this stage is a lead sheet. A lead sheet is a document that gives you the important questions you should ask all potential customers.

When you ask questions, you're gathering information that allows you to evaluate how ready, willing, and able a lead is, and if this is a person you want to work with. When you do enough lead generation, you can be selective and work with the best buyers and sellers. To maximize your efficiency and spend time with the most worthwhile prospects, Tony DiCello recommends you follow up with a maximum of ten sellers and ten buyers.

## 5. Listen

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Listening is essential for establishing rapport. Chris Gabriella, a member of the highly successful CC Sells Team in Ashburn, Virginia, asks lots of questions to learn about the people he talks with. Chris knows that people want to talk about their needs. He repeats back what they tell him, and in doing so, communicates an interest in them.

It is impossible to overemphasize the importance of listening. You must listen to your leads to learn about their concerns, needs, and wants. Start listening during your first conversation and never stop.

## 6. Come from contribution

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Ask, “What can I do to help you today?” That question allows you to learn what is on the other person’s mind. It doesn’t do any good for you to talk about the multiple ways you can be of service if you miss the thing they care about the most. Once you know what they care about, you can be their problem solver and the solution for their needs. Always have your lead (and eventually your customer) on your mind and think about them, not about yourself.

## 7. Begin with the end in mind

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Know where you want the conversation to go (get an appointment or an agreement that you’ll call them in the future) and lead people there. You can do this by asking questions. Always remember, the person who asks questions controls the conversation. When someone asks a question of you, answer the question and quickly follow up with your own question. You might ask why the question they asked is important. The point is, you need to ask enough questions to gather the information you want and you must ask questions that are deep enough to reveal the person’s true motivations and concerns.

*“Listening is about the most important thing you do as a real estate agent.”*

ANNIE O’CONNELL  
KELLER WILLIAMS REALTY  
ALBUQUERQUE, NEW  
MEXICO

*“Everything  
you do is  
about seeking  
agreement.”*

DAVE JENKS  
KWU MASTER FACULTY  
KELLER WILLIAMS REALTY  
INC.  
WHITE PLAINS, NEW YORK

## 8. Seek agreement

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Seeking agreement builds a pattern of saying “yes” to you. The more another person says “yes” before you reach a moment of truth, such as setting an appointment, the more likely they are to say “yes” when it matters most.

Gene Rivers points out the strategic value in constantly seeking agreement—it takes the pressure off of the final closing. He says, “When we build it up to be one big closing event, pressure is on the agent, and pressure is on the buyer or seller. There’s a lot of pressure there—that’s why everybody is nervous. Constantly seeking agreement disperses the energy and tension around the final closing into countless smaller closings.”

Three great strategies for seeking agreement are *trial closes*, *assumptive closes*, and *tie downs*.

### *Trial Closes*

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Trial closes are questions you use to test the water—you genuinely want to find out whether or not you and the lead are in agreement. For example, halfway through the lead sheet, you might ask, “Does that sound good to you?” The answer might not be “yes.” If it isn’t “yes,” you need to return to the issue until it is “yes.” Trial closes help prepare a lead for the final agreement to have a consultation with you or expect a call from you in the future.

*“Give two choices  
for moving  
forward, either of  
which will confirm  
that your prospect  
is moving ahead.”*

TOM HOPKINS  
HOW TO MASTER THE ART  
OF SELLING

### *Assumptive Closes*

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In an assumptive close, you make a statement based on the assumption that you will get the appointment. For example, before you’ve made a listing appointment you might say, “I’ll pull together a complete report of market conditions in your price range to show you during the presentation.” Assumptive closes operate by aligning the lead to your overall objective, which is to get an appointment. Some agents find assumptive closes too aggressive, but the key thing to remember is that you must demonstrate your responsiveness to their needs. So you can use assumptive closes to align them to your goal, and you also need to make it clear that *you* are aligned to *their* goals.

### *Tie-downs*

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Tie-downs are little phrases that get the person you’re talking to into affirmative mode—phrases like “can’t you?” “wouldn’t it?” and “isn’t it?” For example, you could say, “If we market your house right, we should have an offer in less than a month. That would be terrific, wouldn’t it?” These are questions whose answer is always affirmative.

## 9. Respond quickly

Regardless of the way prospects contact you, they expect a quick response. In fact, a survey by the California Association of Realtors found that when buyers or sellers contact a real estate agent online, 21 percent expect an instant response (10 minutes or less), and an additional 23 percent expect a response within thirty minutes.

**C**hris Gabriella, in Sterling, Virginia, saves time responding to online inquiries by using an email template. The template allows Chris to make sure he doesn't omit anything important. His contact management software customizes the template for each new contact by including their name automatically. His email template also includes

1. A "thank you" for the inquiry
2. An MLS link to the property that prompted the contact
3. Other properties matching the buyer's search criteria
4. A suggestion that the person call for additional information
5. An offer to show the property

By using this technology, Chris is able to respond promptly and provide valuable service to prospects. He increases the likelihood of developing a relationship with the potential buyer.



*“Return calls quickly and follow up when you promise to deliver information.”*

KAREN MARSHALL  
THE KAREN MARSHALL  
GROUP  
PITTSBURGH, PENNSYLVANIA

People who are thinking about buying or selling a house are looking around, and when they come across you, they are coming across other real estate agents as well. Who do you think is most likely to get a consultation appointment? It's going to be the real estate agent who is timely and responsive.

Many top agents use Interactive Voice Response (IVR) systems to handle a segment of their marketing and communications. IVR is a telephone system that allows you to capture a caller's phone number while the person is listening to a recorded property description or requesting information on a property. The system captures numbers that call your system. Best practice says you call the person who inquired about that property as soon as possible (within 10 minutes). Ask if they got the information they need and how you can assist them in their home search.

**B**rad Korn heads a successful real estate office in Kansas City, Missouri. Knowing the importance of responding quickly to IVR calls, Brad had his lead coordinator, Tammy, track their IVR calls for a thirty-day period in the fall of 2006. Tammy called all 158 prospects within two to five minutes after the call was received. At the time they stopped following the results, they had



- 11 buyers preapproved for a loan and assigned to a buyer specialist
- 11 leads in their pipeline

Brad attributes their success to Tammy following up immediately, and when she was not able to reach the caller on her first attempt, she called three times a day for three days. When someone answered, Tammy would say, “Hi, this is a quick courtesy call, we’re just following up on the house you called on. We just want to make sure the recording answered all of your questions.” Callers were always asked if they’d like to go see the house. If the house wasn’t what they were looking for, it was a perfect opportunity to ask what they were looking for. Their ultimate goal was always to set up a buyer consultation.

## 10. Communicate in person

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A personal discussion allows you to find commonalities and start to build rapport. You can also get answers to important questions such as the prospect’s motivation and how far advanced the person is in the search process. The more direct your contact (i.e., a direct conversation compared to email), the more prospects you will convert to appointments. Remember, it is harder for a prospect to turn down your request for an appointment when you talk in person than it is to turn down the same request by email.



# *Getting the Most from Internet Inquiries*

Internet inquiries—inquiries that arrive via email or Internet forms—make many agents nervous. They're different from inquiries that come by phone, which usually are from people who are fairly far along in the process of looking for a house or preparing to sell. You ask prequalification questions, gauge their readiness, and either make an appointment, put them on a marketing action plan, or refer them to someone else. Internet inquiries are intimidating because they don't follow this pattern.

- You rarely have a phone number to call and make an appointment.
- Your contact with the person is through impersonal media like email and the Internet.
- Internet leads tend to be more gun shy than your average lead.

## Myth

**Internet inquiries aren't any good.**

## Truth

**Internet inquiries aren't worse than traditional inquiries—  
They're just different**

By all the traditional ways of analyzing an inquiry, those on the Internet may seem like pretty poor bets. But as the digitally addicted Generations X and Y grow up and start buying homes, agents are increasingly discovering just how valuable Internet inquiries can be.

Think about this—when a person calls you, what sort of preparation have they done toward selling their home or getting ready to buy? They've probably examined their finances, done at least a little research into the market, and made some sort of plans about what to do after the real estate transaction. They know they're going to speak to a human being, so they've done some mental preparation—after all, they don't want to look like rubes.

But the Internet provides anonymous, instant information. People who are in the early stages of the buying process can make casual inquiries without doing any preparation at all. In fact, the Internet is increasingly the *first* step homeowners take in the selling process.

What does this mean for you? Does it mean that Internet inquiries are just Looky Lous who will never actually become active customers? Does it mean that Internet inquiries are worthless? Far from it! The fact that people using the Internet are in the first stages of the selling process just means that they require a different process. It generally takes a longer time for them to become a lead.

**G**reg Gorman of Naples, Florida, has found that narrowing his response time pays big dividends. “If a lead comes in from the Internet, we know we’re typically going to have to respond to that lead very quickly. You’ve only got about one to two hours to get back with them. People who are on the Net want everything instantaneously—that’s why they’re on the Internet. And we find that if we’re able to meet that one-to-two-hour goal, we typically can turn that very cold inquiry into a hot prospect.”



Balancing your daily routine with the demands of email can be a real challenge for the busy solo agent. Preserve your schedule—and your sanity—by time-blocking three or four periods throughout the day to respond to emails.

Agents with teams should make it a team goal to respond immediately to Internet leads. Solo agents face more of a challenge. Solos who truly want to maximize their investment in the Internet have their emails routed to their PDAs so they can respond throughout the day—as close to instantly as is possible.

## Email Response

You can also attach a specially formatted lead sheet to the email—even if they aren't comfortable talking with you over the phone, they may be willing to fill out your form, which will provide you with valuable information and keep the process moving forward.

## Video Email

A particularly impressive variation on the response email is the video email. This service allows you to record impromptu videos using a computer camera in response to each email or form. These short videos are then emailed back to the contact. This technology gives you the chance to tailor your response to each inquiry and create a stronger personal connection with them. It also separates you from the herd by demonstrating how technologically adept you are.

## Free Comparative Market Analysis (CMA) Forms

Many top agents cultivate Internet seller inquiries by offering a free CMA on their website. In order to receive the CMA, the seller has to fill out an electronic form that gives the agent important contact information and details about the property. (See Chapter 5: The Internet Lead Generation Model of *Internet Lead Generation: Maximizing Your Online Impact* for more details on what to include in an online form.) These agents usually respond with an *estimated* price range and then suggest a personal meeting so the agent can assess the house and make a more precise estimate. Internet inquiries require you to strike a balance between giving the sellers the information they want and reserving some of your value and service for those customers who have signed formal agreements with you.

## Systematic Marketing Plans

Once you have responded to an initial inquiry, be sure to put the contact on a systematic marketing action plan, such as an 8 x 8 or 33 Touch (if you have their postal address) or 12 Direct (if all you have is an email address). Since most of your communications with them will be via email, be careful not to spam them. Make sure the information you give them has value, and don't send out more than one email per month.

Internet users often revel in their electronic anonymity. Don't worry if they're not ready to speak to you over the phone—feed the relationship by giving them the information they want in whatever format is most comfortable for them. Provide the services you promise, respond quickly to emails, and keep in touch. When they trust you, when they have gathered all the information they need, and when they're ready to move, they'll be ready to meet with you in person.

Research for *Internet Lead Generation: Maximizing Your Online Impact* shows that the most effective responses are meaningful and interactive. A combination of personal phone calls, automated email marketing campaigns, and the Buyer Instant Notification System (BINS) available through your IDX provider will net you the best results. See Chapter 5: The Internet Lead Generation Model of *Internet Lead Generation* for more information on current marketing technologies.

# Consultation

## Prequalification

One of the most important steps in working with sellers and buyers is having an in-depth consultation to determine their true needs and wants. This section covers information you want to gather *before* your face-to-face consultation. This information lets you know how urgent the potential customer's real estate need is. It also helps you prepare for the consultation, get a feel for their behavioral style, and learn how you can provide value.

An important thing to remember is that you only have a minute or two to make a positive impression. The challenge is that leads are different. What is successful with one person might not work well with another. That's where you start using what you know about personality profiles. A person with a High-D profile will most likely have a very short conversation, but someone else could talk with you for a half hour. Because of the range of people you'll talk to, you can't have a rigid way of dealing with everyone. You should have a lead sheet that prompts you to ask the most important questions. You have to be flexible, gather as much information as you can, and demonstrate that you can provide value.

Lead sheets serve as a reminder of the information you want to get. You may want to have multiple lead sheets—one for sellers and another for buyers. You may even want an additional lead sheet for out-of-town buyers. You should keep lead sheets everywhere you might be when you take a call—at your office desk, at home, in your car, etc. When a lead becomes a customer, the lead sheet is the first thing you put in the file.

Sample lead sheets are in the Appendix and on the Toolkit CD. There are two versions of each lead sheet. The first has short prompts. The second version contains scripts. Use which ever one suits your style better. In addition, the files on the CD are in Microsoft Word so you can tweak the scripts to fit the way you work.

## Questions to Ask Sellers

When sellers call you, they are usually already interested in at least considering using you as their listing agent. Since you're about to invest several hours in them, you need to find out a little bit about them, and you want to start building a relationship.

You ask prequalification questions to find out if they are financially able to sell, if they are sufficiently motivated to sell, and if you will be able to work with them. (For example, some agents won't work with sellers whom they perceive as too fixated on commission.) The questions in the "Motivation" and "Financial" sections of the Seller Lead Sheet help you get the information you need to prequalify potential customers

Building a relationship with sellers entails building trust and rapport, and gathering as much information about them as possible. Use your Lead Sheet to capture this information so you can use it to prepare an accurate CMA and tailor your listing presentation to their needs and concerns. The "Motivation" and "House" sections of the Seller Lead Sheet will help you organize the key facts you learn about sellers.

Going through prequalification questions makes it easier to ask for an appointment because the appointment is the next natural step in the conversation. Let's look at some of the questions you'll need to ask.

### How did the seller find you?

*“When I find out a caller was referred to me, I immediately send a thank you to the person who referred them.”*

You want this information so you know which lead generation activities are giving you the most business. Once you collect data on your lead sources, make sure you analyze the data and adjust your lead generation activities appropriately. You might increase your expenditures on activities that have been successfully bringing you leads, and change your strategy or terminate any activities that are not producing results.

**AGENT:** By the way, what prompted you to call today?  
I'm just curious, how did you get my number?

If you encountered the sellers at an event, such as an open house, ask,

**AGENT:** How did you happen to hear about *this event*?

TONYA LEIDICH  
KELLER WILLIAMS REALTY  
DOVER, DELAWARE

### Who are they and how can you get in touch with them?

People are often hesitant to give you their name and phone number right away. Many top agents recommend building some rapport and providing answers to questions before asking a person to identify themselves. A good strategy is to offer information in exchange for their name and address or phone number.

**AGENT:** I'd be happy to give you an estimate of what your home is worth in today's market. Can you please give me the address of your home?

### What is their motivation for selling?

You need to be able to gauge a potential customer's level of motivation. Sellers who don't *need* to sell their home may not be willing to make necessary repairs or agree to a reasonable listing price. As you analyze the lead, combine your understanding of their motivation with other factors. A person with low motivation whose house is in great condition and who has reasonable expectations about price might still be a good customer. However, a person with low motivation who is inflexible about price is someone you may want to decline.

**AGENT:** Why are you moving?  
When do you have to be out of your house?

In addition to understanding the circumstances that are prompting them to sell their home, ask them to rank their own level of motivation.

**AGENT:** On a scale from 1–10, how motivated are you to sell your home?

This can help you to understand their perceptions and misconceptions about selling. If, for example, they have to start a new job in another city in four months, but they only rank their motivation as a "5," you need to dig a little deeper to understand where they're coming from.

Combine all of this information to decide whether or not they are a good fit for you and to understand how much self-discovery the owners will have to do to successfully sell their home.

*Can you get additional or referral business?*

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Always try to get multiple deals out of each transaction. You can drum up buyer and seller business through your marketing around a listing, but don't forget the most effective way to get new business—ask for it.

**AGENT:** Where are you moving to?

Are you already working with a Realtor to help you find your next home?

If they are moving to another town, say

**AGENT:** I know some terrific agents in *the town you're moving to*—would you like me to recommend someone who I know will do a great job for you?

*How marketable is the home?*

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Use your market knowledge to analyze the information they give you. If the home is not very marketable—it's in a problem location, or it's in poor condition, for example—you can adjust your listing presentation to help them self-discover the work they will need to do to make the home marketable.

**AGENT:** How much do you think your home is worth?

What is the square footage?

How many bedrooms, bathrooms, and other rooms does it have?

How old is it?



What is the seller's financial situation?

Financial questions can be very uncomfortable for sellers, who may be behind on their mortgage payments or even upside down. Be sure to communicate that you are looking out for their best interest, and always be nonjudgmental.

**AGENT:** I want to make sure I help you make the best financial decisions during this process. May I ask how much you owe on your mortgage(s)?  
Are you current on your payments?

Ask for an appointment.

**AGENT:** I'd like to set an appointment to meet with you for a complimentary consultation that will last 30 minutes to 1 hour. I'll walk you through the home selling process, you can provide all of your expectations and your goals, and you'll have an opportunity to learn about what I offer so we can get your home sold. Would day and time or alternate day and time be better for you?

And when would be a good time for us to come out and get your home on the market?"

I'd like to come over and meet with you to discuss this in more detail. Would day and time or alternate day and time be better for you?

*“Asking for an appointment doesn't have to be a big production. Just ask!”*

TONY DiCELLO  
DIRECTOR, MAPS  
INSTITUTE  
KELLER WILLIAMS REALTY  
INTL.  
AUSTIN, TEXAS

## Questions to Ask Buyers

Your first contact with buyers is often a phone call. Your most important goal is to get the caller's name and phone number so you can put that person in your database and follow up. You also want to set up an appointment for a buyer consultation. The place where you hold the consultation is a reflection of your professionalism. Recommended locations are a conference room at your Market Center or in your office. In these locations you can control the environment and minimize distractions.

Yard signs generate a significant number of phone calls. What many real estate agents don't realize is that people calling from a yard sign or from an ad have goals that are different from yours. These callers want to find out if the property is a good fit for them. If it is not, they want to get off the phone as fast as possible.

*Who are they and how can I get in touch with them?*

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A serious home buyer who is receptive to working with you will give you a name and phone number without any problem. However, not all callers are willing to give out contact information. Most top agents use Caller ID, but people can be calling from phones other than their own, so you always need to ask for their name and number.

As with sellers, you are more likely to get the information you want if

1. You start to build rapport before asking for their contact information.
2. You demonstrate the benefit of giving you their contact information (e.g., I'll send you some information.)

**AGENT:** I'd like to give you some information about real deals on the market right now. Would that be of value to you?

**BUYER:** Yes, that would be great.

**AGENT:** What is the best way for me to get in touch with you?

**BUYER:** You can send me an email.

**AGENT:** Great! First let me get your name and then your email address.

### Alternatives for getting a name.

**AGENT:** By the way, I'm agent name, who am I talking with?

**BUYER:** I'm first name.

**AGENT:** Nice to meet you, first name. And your last name?

## Tip

Once you have a person's name, use it.  
People like that kind of recognition and it builds rapport.

When Veronica Gonzales, a Buyer Specialist with Jama Fontaine & Associates in Albuquerque, New Mexico, suspects she may have trouble getting a caller's name, she thanks the caller for the inquiry and says the property is great. Then she asks if she can call right back after she gets the file on the property so she can provide the best possible information. Alternatively, she may let a caller know that she has to finish up with someone on another line. Veronica reports that it is easy for her to get a name and phone number.

**AGENT:** I need just a minute to finish another phone call. Can I please get your name and phone number so I can call you right back?

Sometimes a caller may give you a bad phone number. Steve Johns, a top agent in Overland Park, Kansas, has a technique to find out if he is getting a valid phone number. He asks for the phone number then repeats it with an error. If the caller corrects him, he knows he's got a good number.

**AGENT:** Can you give me your phone number, please?

**BUYER:** It's 555-5555.

**AGENT:** Great, that's 555-5556?

**BUYER:** No, it's 555-5555.

When a caller refuses to give you a name and number, don't worry about it. Provide helpful information, and that person may be willing to work with you in the future. You can't tell how it will play out. The fact is, not everyone whom you talk to is going to do business with you. They may not be ready or there could be other reasons. Whatever the case, you should be focusing your time on the people who are ready to work with you now.

*Does the buyer already have a relationship with a real estate agent? (Yes)* \_\_\_\_\_

When you ask if someone is already working with a real estate agent, the answer is often “yes,” but that answer may or may not be true if the prospect is merely hesitant to move forward. You are more likely to get an honest answer if you ask whether the buyer has looked at homes with another agent.

**AGENT:** Has an agent already taken you out and shown you properties?

*BUYER:* Yes.

**AGENT:** How’s that going?

*BUYER:* Pretty well.

**AGENT:** That’s great. A real estate agent can really help a lot. If anything changes for you, please feel free to call me if there is anything I can do to help.

*[If the relationship is not going well...]*

**AGENT:** I respect the relationship you have with another real estate agent. If things don’t work out and I can ever be of assistance, feel free to call back. I’d love to help you find what you’re looking for.

## Truth

**You don’t get anywhere by criticizing your competition.**

*Does the buyer already have a relationship with a real estate agent? (No)* \_\_\_\_\_

If the caller is not working with anyone else, you can proceed with questions on the lead sheet or you may want to try a trial close right away.

**AGENT:** I respect the relationship you have with another real estate agent. If things don’t work out and I can ever be of assistance, feel free to call back. I’d love to help you find what you’re looking for.

*Is anyone else buying the house with the person you're talking with?*

When you pursue a relationship and have a buyer consultation, you want to meet with everyone who will be making the purchase. It is important to find out what each purchaser needs and wants. Initially, you have to make sure their needs and wants are compatible, and then you may have to prioritize features. Either way, you need to gather information from everyone making the purchase.

**AGENT:** Is anyone else buying the house with you?

If someone else is making the purchase, get the name of that person.

*Who will be living in the house?*

You want to find out who will be living in the house and the needs of each person. You can pursue this in-depth in your buyer consultation, but you may want to get some preliminary answers up front.

**AGENT:** Who will be living in your home?

*Where is the buyer in the home search process?*

**AGENT:** So how long have you been looking for a home?

What areas are you interested in?

When do you need to be in your next home?

What happens if you can't find a house to buy?

Have you seen any houses that you like?

Tell me about them.

What prevented you from purchasing it?

*“If you just start talking to people, they'll tell you anything you want to know.”*

KAY HORACEFIELD  
THE HORACEFIELD TEAM  
HOUSTON, TEXAS

What is their motivation for buying?

It's important to know about the buyer's motivation. You want to position yourself as the person who can answer that need. In addition, the answer to this question provides insight into appropriate next steps. You may need to send a relocation package. You may find out that you have a hot buyer, and it's time to move fast. This question should also help you differentiate between serious home buyers and "Looky Lous." A serious home buyer will see the value of coming to your office for a consultation. A Looky Lou only wants to look at houses, and therefore, will see no value in spending time in your conference room (can be a conference room at your Market Center). You need to determine who is a Looky Lou because you don't want to waste your time with that person. People who are not ready to make a purchase in the near future should be put on a marketing action plan.

**AGENT:** *Mr./Ms. Buyer*, out of curiosity, I'm interested to know why you are buying. What's prompting your move?

Does the buyer need to sell a home in order to buy the next one? (Renter)

**AGENT:** *Buyer's name*, quick question. Do you own the place where you are living now or are you renting?

**BUYER:** *We're renting.*

**AGENT:** Do you know when your lease is up?

Does the buyer need to sell a home in order to buy the next one? (Owner)

**AGENT:** Do you need to sell your current home before you buy the next one?

**BUYER:** *Yes, we do.*

**AGENT:** Have you talked with a real estate agent about selling your current home?

**BUYER:** *No, not yet. We want to see what's available before we decide if we are really going to move.*

**AGENT:** That's fine. I understand, and let me walk you through the home buying process. If we were to go out and look at houses tomorrow, and you found the perfect house, and you told me you wanted to make an offer on it, subject to the sale of your house, with the market the way it is, in all likelihood, the seller would not accept a contingency because your house isn't at least under contract.

So, an important thing we need to think about is—if we go out looking at houses, you have to realize you're only doing it really to see what you can get. You're not looking for *the* specific house, which can sometimes get kind of frustrating because if you do find the perfect home, chances are, we can't get it. You see, you're not ready yet in terms of having your house under contract. If we look at a couple of houses and you realize you can find what you are looking for, we really need to focus on getting your home sold.

Once your house is sold, you'll be able to negotiate much better on a new house because you are a more desirable buyer. Let's set a time for me to take a look at your house so I can help you figure out how to move ahead.

It's important to remember that the best agents spend their face-to-face time with people who are ready, willing, and able to do business now. Your best option is to meet with the potential customer, get the listing, and then move ahead with the home search process. One option is to have the prospect drive by properties that meet their criteria to get a feel for what is available without taking much of your time.

If the buyer is already working with a listing agent, get the agent's phone number. Most people want to move directly from a house they are selling to the one they are purchasing. You need to work cooperatively and productively with the listing agent to make sure the sale goes through before the new purchase takes place. This is a conversation that may happen when you are asking preliminary questions, or it may wait until you are face-to-face in a buyer consultation.

### *Ask about financing*

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As with sellers, money is a sensitive topic. A caller who doesn't feel comfortable with you may find financial questions intrusive, so phrase your questions carefully.

**AGENT:** Will you be paying cash or getting a mortgage for the purchase of your home?

*BUYER:* *Getting a mortgage.*

**AGENT:** Have you been preapproved for a mortgage yet?

*BUYER:* *Yes.*

**AGENT:** That's great! Who are you working with?

If it's a reputable lender, you may not need to take any further action. If the caller comes to your office for a consultation and becomes your customer, Gary Keller recommends calling the lender to make sure the lender and loan officer are reputable and capable, and the buyer is getting a good mortgage for their situation.

When Amy Denham, a Buyer Specialist on the Gary and Nikki Ubaldini Team and former loan officer, has a customer using a lender she doesn't know, she asks if the customer knows anyone who has successfully gotten a loan from this lender. If the answer is "no" (as is usually the case), then she has the customer get a back up preapproval. Amy recommends several lenders whom she knows and trusts.

**AGENT:** I have several lenders who are competitive. They will deliver what they promise. You won't be promised one thing and end up with something else or nothing at closing.

You'll want to call the buyer within a couple of days to make sure they are moving forward with one of your recommended lenders.

Notice that the script says you have multiple lenders. If you recommend only one mortgage banker, something goes wrong with the loan, and the buyer pursues legal action, there is a chance charges could be filed against you for endorsing, recommending, or promoting a particular lender.

Also note that you must comply with the Real Estate Settlement Procedures Act (RESPA) regulations ([http://www.hud.gov/offices/hsg/sfh/res/respa\\_hm.cfm](http://www.hud.gov/offices/hsg/sfh/res/respa_hm.cfm)). If you have an affiliated business arrangement with a mortgage provider, you must disclose your affiliation in writing at the time of the recommendation. For more information, watch the KWConnect video, "KW360," under Power Perspectives/ Industry or read the file named "Affiliated Business Arrangement" on your Toolkit CD (from the KWU course *Winning Through Mortgage*).



A good thing to remember is that you want to have your buyers preapproved before you invest face-to-face time with them. That way, you'll know what they can afford, and you'll know they are serious buyers. "Prequalification" is not good enough because it is based on unverified information, so you can't be sure what the buyers can afford.

**AGENT:** Exactly how much house did your lender say can you buy?

Steve Johns has a convincing story he uses when he gets pushback on preapproval.

**AGENT:** Let me tell you a quick story about what happened to some buyers I worked with awhile back. This couple didn't see any benefit to getting preapproved. I knew they wouldn't have any trouble getting a loan, so I took them out to see a house that appeared to be just what they were looking for. Sure enough, they fell in love with that house. We made an offer, but so did another buyer who was preapproved. We lost the house because the sellers accepted the preapproved buyer's offer since they knew the buyer actually had the money lined up. I would just hate for that to happen to you.

### *Get an estimate of what the buyer feels is affordable*

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Buyers don't always want to buy as much house as they can afford, so in addition to knowing the amount for which they are preapproved, you need to know what price range they are comfortable with because you don't want to waste your time investigating houses they won't buy.

**AGENT:** What price range do you have in mind?

Brad Korn, a top real estate agent in Independence, Missouri, recommends adding a cushion to the upper and lower end of the price range, especially in a buyer's market. If you show properties above the price your buyers gave you, let them know that you anticipate being able to negotiate the price down to something that is comfortable for them. For example, if Brad has a couple looking for a house in the \$250,000–\$300,000 range, he'll search for properties from \$248,000–\$306,000 to make sure he doesn't miss anything the buyers would consider.

### *Find out who has influence over the buyer*

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**AGENT:** Is there anyone else who will be involved in your home buying decision?

Everybody talks to somebody for advice—you just need to find out who the influential person is and include that person in meetings and house tours, if possible.

*Are there any barriers to making a purchase?*

**AGENT:** On a scale from 1–10, with 10 meaning you must buy a home as quickly as possible and 1 meaning you're not sure you'll really buy anything, how would you rate yourself?

What would it take for you to become a 10?

*Ask for an appointment.*

**AGENT:** I'd love to help you buy a home. In order to help you find a perfect home, all we need to do is set an appointment [with all of the decision makers] so I can help you get what you want in the time you want.

What is a better time for us to meet, day at time , or alternate day at alternate time?

Prospects may question why they need to come into your office for a consultation. It's important to remember that they are anxious to go out looking for a home. You need to let them know the benefits of having a consultation—you'll learn about their values, needs, and wants so you can screen houses and your buyers won't waste their time looking at a lot of houses they aren't going to buy. You'll also be able to answer their questions, let them know how you work, and educate them on current market conditions as well as the home buying process. If you typically show properties online during the consultation, let your prospects know that they will use their time efficiently by previewing lots of properties in your office.

***Alternate Approach***

Many agents ask questions about the home the caller wants to buy on an initial phone call. If you do that, be prepared to make adjustments to the buyers' needs and wants when you have a couple together in your consultation. What the caller tells you may not reflect what their partner wants in a home. Also, couples often aren't sure what they want and change their answers once they really start thinking seriously about their purchase. The questions you ask in a buyer consultation will help them clarify what they want in a home.

If you gather home search information on an initial phone call, be aware that buyers will probably have the expectation of looking at property online during the consultation. What you show them will probably not match their needs and wants as closely as what you can find after you are able to narrow the search based on a thorough consultation.

## Common Buyer Questions

People who call on yard signs or ads often ask similar questions. Being prepared with answers allows you to demonstrate your expertise.

Best practice says you answer a question (provide value) and immediately follow it with your own question. Asking questions allows you to control the direction of the conversation and get the information you need in order to effectively move forward with the customer.

### How much does it cost?

**BUYER:** *I'm calling about the house at 123 Main Street. How much does it cost?*

**AGENT:** That's a great house. We're getting a lot of calls on it. As I'm pulling it up on my computer, tell me, what is it about that house that caught your eye? *[Affirm what the customer likes]* The price is list price. Is that in your price range?

### How big is it?

**BUYER:** *How big is it?*

**AGENT:** What size house are you looking for? The house is listed as number square feet.

### How soon can I see it?

Many callers want to see a home right away. However, you should remember that your goal is to get them into your office for a consultation. Shon Kokoszka in The Kokoszka Group in Arvada, Colorado, used a script that he finds very effective for getting people who call on a sign into his office.

**BUYER:** *Could I take a look at the house?*

**AGENT:** I'd be happy to show you the home. All we need to do is simply set an appointment for you to come to the office. I'll pull up every home that matches your specific criteria that is available through every real estate company in your city and download the color pictures and virtual tours so you can view them on screen in my office before even taking your time to drive by them or spend your money on gas driving through neighborhoods. And you do want to save time and money, don't you? *[Wait for response.]* Great, so what's the best time for you to buy a home with me, weekdays or weekends?

### *Alternate Approach*

**AGENT:** I'd be happy to show you the house. To make sure we won't be wasting your time, let's get together and talk to a lender to be sure you don't fall in love with a house we can't afford to buy.

#### Where is it?

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**BUYER:** *Can you tell me where the house is located?*

**AGENT:** It's in the name of neighborhood area. Is that an area you are considering?

#### Can I just drive by the house?

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Many buyers want to drive by a house they see in an ad. Karsten Musaeus in Colorado Springs, Colorado, has a script that is effective for helping these people see the value of a consultation.

**BUYER:** *I'd like to drive by and see the house. Can you give me the address?*

**AGENT:** I can give you the address, and if you are serious about buying a house, the thing you really should do is come into the office for a free consultation. When I agree to work with a home buyer, I am totally committed to helping that person. In order to provide top quality service, I ask questions to find out what you want in your heart and what you want in your head.

You see, it's important to think about both of those things. Your head says, "I've got limits to what I can spend and the house has to meet certain requirements." Your heart says, "I've got to love the house. If I don't, why buy it?" As a home buyer, you need somebody who can help you find property that meets all of your needs. I can start by showing you on the computer every single property that the meets your criteria. You need someone who can help you discover all of your options and then provide support when you've decided on the property that is best for you. How does that sound? So what's the best time for you to come to the office, today at time or tomorrow at alternate time?

### Can you tell me the schools for that location?

**BUYER:** *Can you tell me the schools for that location?*

**AGENT:** Great question. Tell me how old are your children? [Wait for response, then give names of schools] You know, I could show you the house and from there we could drive to the school so you'd see exactly where it is. How does that sound? [Wait for response.] First I'd like to meet with you to ask some important questions about what you're looking for. What's the best time for you to come to the office, weekdays or weekends?

### How negotiable is the price?

**BUYER:** *Do you know if the seller is willing to negotiate on the price?*

**AGENT:** Price, conditions, and terms are often negotiable. What price range are you looking for? [*Provide information on what is currently happening in the local market*]

## Answers for Objections and Barriers

### I'm not going to buy for awhile. (Rick Geha, Fremont, CA)

**AGENT:** Oh my gosh, we've got to get together. I usually meet with people nine months before they buy so I can start them on the path to home ownership. How would you like a completely free consultation on the entire process from start to finish? There's absolutely no obligation at all for you to talk to me ever again after that! You'll probably learn more than you ever wanted to know about real estate. You'll probably learn enough to know that you don't want to be a real estate agent and you'd rather have me handle the transaction for you. And remember, when the consultation meeting is finished there is no obligation for you to ever talk with me again. At least you'll be educated on what has to happen for you to find a great home.

*I'm in a lease—I'm not ready. (Linda Laitinen-Schultz, Columbus, WI)*

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**BUYER:** *I appreciate the call, but my lease doesn't expire for months. Call back.*

**AGENT:** Now is a good time to start looking. In most cases, 30 days have passed by the time an offer is written, negotiated, accepted, the inspection completed, and the title and insurance ordered. You don't want to wait until the last minute to look. You need time to move and pack. I suggest starting the process three to four months before your moving date.

*I won't be moving for a couple of months. (David Raesz, Austin, TX)*

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**AGENT:** What we need to do is get started today. Your loan prequalification is going to take about seven to ten days. It may take us a couple of weeks to find a home. Once we go through the contract process, you're going to be looking at about thirty days to close. You're going to be right on target. Let's get started today.

*I'm in a lease. (Sue Lusk-Gleich, Columbus, OH)*

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**AGENT:** What is your goal at the end of that lease? To move, or do you have the option to extend that lease without penalty on a month-to-month basis?

**BUYER:** *I need to move.*

**AGENT:** Now is the time to get prepared. You'll have to get preapproved and start your housing search, and then find the house. Typically a preapproved buyer can close on their home in thirty days. If you are sixty days out, that'll allow you thirty days to look for the property. And then you'll be able to close within the next thirty days. The timing is perfect.

We're just looking. (Sue Lusk-Gleich, Columbus, OH)

**BUYER:** *I'm not sure I really want to buy.*

**AGENT:** Why are you not sure?

**BUYER:** *I don't know, I'm just not sure.*

**AGENT:** About owning a piece of property?

**BUYER:** *I'm not sure I really want to buy.*

**AGENT:** How do you feel about continuing to rent and putting your money into an apartment and receiving no equity build or tax advantages? *[Wait for response.]* You're already paying utilities and rent. If you own a home, you'll get tax deductions, the power of ownership, and the benefits of appreciation, none of which you'll be able to get out of a landlord. You can either pay your mortgage down or you can pay your landlord's mortgage down.

I've got a friend who's a real estate agent.

**AGENT:** Something you might want to think about is when you start to buy or sell a home, your life becomes an open book, including your financial situation. Also, real estate can be a risky business and something could go wrong. You might want to reconsider using your friend. Would you like to learn more about what is involved in buying/selling a home?

We plan on selling our home, but not until we fix it up. Call back then.

**AGENT:** I think I might be able to help you. I have a list of contractors and suppliers that I've worked with in the past. Plus, I can give you pointers on what to fix and not fix. Not all expenditures will give you a return, and sometimes homeowners fix things that really don't need fixing. Could we meet to talk more about this?

*I can find homes on my own. (Bill Flowers, Gilbert, AZ)*

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**BUYER:** *I appreciate everything you have shown me that you can offer, but I really think I can find a home on my own using the Internet.*

**AGENT:** I can understand why you say that, but we have found that many times the homes on the Internet may not be updated quickly and may not be available anymore. Also, we can save you many hours of driving around by doing the research in the Multiple Listing Service for the available homes that meet your needs and desires.

*I can find homes on my own.*

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**BUYER:** *I thought I could find homes on my own.*

**AGENT:** A lot of times you can, and the benefit of working with a great real estate agent like me is that you'll be looking and I'll be looking. The most important thing is that as agents, we have the inside track. We can use the computer to search for houses as soon as they come on the market. The best properties sell very quickly. I can get you in to see houses right away and you don't want to miss out on the best houses, do you?

**BUYER:** *Okay, that explains it. But wouldn't I be saving money just buying from a seller or their agent?*

**AGENT:** That's an interesting question. I never charge a buyer for my services. The seller pays the commission. It will cost you nothing to have me work for you. The only thing I ask is that, because I work on commission, we set up a couple of ground rules that will protect you and me. One of those rules is when you see a property you like, you call me first—don't call the seller's agent. The seller's agent represents the seller's best interests, not yours.



# *Classify Your Leads*

When you talk with prospective customers, you ask questions that allow you to determine if they are ready, willing, and able to do business with you now. You want to know

1. What are their barriers to moving forward?
2. Can you remove those barriers?
3. Are they qualified?
4. Can you work with them?
5. Will they be a liability for you?

## **Reasons to Classify Potential Customers**

1. Determine how quickly you want to meet in person.
2. Decide how much you will cover in the consultation.
3. Determine what you need to do for follow-up.
4. Eliminate prospects who are not good business for you.

You generally want to set an appointment with prospective customers as soon as possible. Top agents report a very high rate of converting prospects into customers at a face-to-face consultation.

*“You want to be actively working with buyers who will buy within a week.”*

RICK AND TERI BRENKUS  
THE BRENKUS TEAM  
LAS VEGAS, NEVADA

### *Alternate Approach*

While the best practice is to hold a consultation as soon as possible, some top agents don't want to do a consultation until leads are willing, ready, and able to do business with them immediately. This approach says you don't want to invest any face-to-face time until a buyer is ready to make an offer as soon as the right house is found. Similarly, you don't want to invest time or money with sellers until they are ready to accept a reasonable offer.

While you want to have a consultation with as many buyers as possible, the only ones you should put in your car are the ones who are willing, ready, and able to buy now. All of the rest go on an 8 x 8 marketing plan. As far as sellers are concerned, the ones who get most of your time are those who are ready to sell now.

## Potential Customers to Avoid

### Sellers

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Many listing agents have standards for their customers. They decline to work with

1. Sellers who are fixated on commission, not value
2. Sellers who are unreasonable about price

Good scripts can often convert these kinds of sellers into profitable customers, but in some cases they are simply too stubborn or too bad of a match for you to be able to persuade them. In that case, you don't want overpriced inventory hanging on your hands—you can courteously tell them

**AGENT:** I don't think that I can meet or exceed your expectations if that is the price you want. I'd rather turn you down now than let you down later.

Then remember to go for the referral:

**AGENT:** However, I do know an agent who could do a great job for you.

Choose an agent with whom you have a strong referral relationship. When you make this recommendation, always describe some characteristic or experience of the person you're recommending that would make them particularly well-suited to handle this seller's special challenges or concerns.

**AGENT:** Agent Name is a fantastic agent in my Market Center, and he specializes in [your neighborhood/older homes/your builder/etc.] He sells homes percentage faster than market average—I know you'll be very happy with him!

### Buyers

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Similarly, there are a few buyers you want to avoid:

1. Buyers already committed to another real estate agent
2. Buyers who are unwilling to get preapproved for a mortgage loan

## What's Next?

Congratulations! You've got an appointment! What comes next? KWU's buyer and seller courses pick up from here and help you prepare for a consultation, then provide superior service that will allow you to turn your customers into customers for life.

And what about people you've met who aren't ready to buy or sell right away? We pay attention to all of our Mets, but we prioritize who we spend the most time with. People who are ready, willing, and able to do business right away get our immediate attention and face-to-face time. Everyone else goes into our lead follow-up system, and we stay in touch with them regularly, until they are ready to conduct business.

Notes

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# *Putting It All Together*

## Power Session Aha's

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## Your Lead Generation Action Plan

Your success in the discipline of lead generation is dependent on your daily habit of action. If you focus your actions, you will propel yourself forward to 36 transactions or more per year.

Use the Action Planning Worksheet on the following page to record numbers from both your current lead generation program and your future goals. Then determine what actions you will take to “close the gap” (if any) between your current state and your goals.

These are your focused actions. When specifying them, consider:

- Adopting lead generation activities that complement each other and suit your behavioral style and interests.
- Mastering at least three reliable lead generation activities that you will be able to rely on in your business.
- Tracking your results with each activity and continuing to add new activities over time.

Note next to each activity how often you will conduct it—is it daily, weekly, or monthly?

### Lead Generation Action Planning Worksheet

	Current as of _____	Goal by _____	Activities to “Close the Gap”
<b>Annual GCI:</b>			
<b>Annual Closed Transactions:</b>			
<b>Annual Transactions from Agent-to-Agent Referrals</b>			
<b>Number of Agents in Database (both Mets and Haven’t Mets)</b>			
<b>Number of Agents Added to Database (daily)</b>			
<b>Number of Activities (monthly) (Events attended, leveraging Mets, etc.)</b>			
<b>Number of Leads from Other Agents (monthly)</b>			
<b>Number of Closed Transactions for Referrals Received from Other Agents (monthly)</b>			

## The 3-Hour Habit

### The Power of One

**Focus on just one thing—lead generation.  
Develop one habit—3 hours of lead generation every single  
workday.**

Of the activities listed on your Lead Generation Action Planning Worksheet, which will you add to your calendar for this week?

By adding items to your calendar, you are time blocking. Time blocking means that you always know what your most important job is every day and that you commit to getting it done. It means that you are going to do what you must do: generate leads. You're going to call and meet people, prepare marketing materials, network, host open houses, and prepare seminars. And it means that whichever of these actions you decide to focus your efforts on, you are going to get really good at them over time.

There are just three simple rules you must follow to put the powerful daily habit to work for you. But beware that these must be adhered to and not taken lightly.

1. Time block 3 hours every workday before noon.
2. No skipping. If you must erase, then you must replace.
3. Allow no interruptions (unless they truly are emergencies).

Time on the task beats talent every time. And when you follow these three rules, you're making sure you put in the right amount of time on the right task.

Use the calendar on the following page to time block your lead generation activities. What did you learn during today's Power Session that you would like to incorporate into your regular lead generation program? What did you list on your Lead Generation Action Planning Worksheet that you can start doing?

This calendar is your flexible draft. Sketch out how you will handle your time here. Then, add these activities to your real calendaring system—whether it's an electronic calendar, like Microsoft Outlook, or a paper-based calendar.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
8	8	8	8	8	8	8	8
9	9	9	9	9	9	9	9
10	10	10	10	10	10	10	10
11	11	11	11	11	11	11	11
12	12	12	12	12	12	12	12
1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2
3	3	3	3	3	3	3	3
4	4	4	4	4	4	4	4
5	5	5	5	5	5	5	5
Evening	Evening	Evening	Evening	Evening	Evening	Evening	Evening



# *Appendix*

1. Lead Sheet: In-Town Buyers (prompts)
2. Lead Sheet: In-Town Buyers (scripts)
3. Lead Sheet: Out-of-Town Buyers (prompts)
4. Lead Sheet: Out-of-Town Buyers (scripts)
5. Lead Sheet: Sellers (prompts)
6. Lead Sheet: Sellers (scripts)

# In-Town Buyer Lead Sheet (prompts)



Date: \_\_\_\_\_ Lead Source: \_\_\_\_\_

Contact Info	
Name _____	
Email _____	
Current Address _____	Children (names/ages) _____
Home # _____	Cell # _____
Work # _____	Fax # _____
Best way to get in touch _____	Best Times _____

## Buyer Consultation Prequalification Questions

1. Already working with a buyer's agent? \_\_\_\_\_  
\_\_\_\_\_
  2. Is this a single purchaser? Yes No *If no, who else?* \_\_\_\_\_
  3. People who will live in the house \_\_\_\_\_
  4. Length of time looking for a home \_\_\_\_\_ See anything good? Yes No  
*If yes, description* \_\_\_\_\_ *If no, why not?* \_\_\_\_\_  
Reason for not purchasing \_\_\_\_\_
  5. Reason for move \_\_\_\_\_
  6. Current situation: rent or own? (*circle one*)  

Renter: When is lease up? _____	Owner: Need to sell existing home? Yes No <i>If yes, working with a listing agent?</i> Yes No <i>If yes, who?</i> _____ Date/time for listing consultation _____
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  7. Method of financing: cash or mortgage  

Mortgage: Preapproved by a lender? Yes No	Preapproved: Lender's name _____ Phone: _____
Mortgage amount _____	Down payment amount _____
Recommend lenders? Yes No	<i>If yes, who?</i> _____
  8. Preferred price range \_\_\_\_\_
  9. Names and relationship of others involved in the home buying decision \_\_\_\_\_  
\_\_\_\_\_
  10. Level of motivation to buy: 1 2 3 4 5 6 7 8 9 10  
*Anything less than 10: What would it take to become a 10?* \_\_\_\_\_
  11. When do you need to be in your new home? \_\_\_\_\_
  12. Appointment date and time: \_\_\_\_\_
- Other information \_\_\_\_\_  
\_\_\_\_\_
- Need for confidentiality: \_\_\_\_\_
- Behavioral style: D I S C

# In-Town Buyer Lead Sheet (scripts)



Date: \_\_\_\_\_

Lead Source/Property that prompted call: \_\_\_\_\_

## Contact Info

Name \_\_\_\_\_

Email \_\_\_\_\_

Current Address \_\_\_\_\_

Children (names/ages) \_\_\_\_\_

Home # \_\_\_\_\_

Cell # \_\_\_\_\_

Work # \_\_\_\_\_

Fax # \_\_\_\_\_

Best way to get in touch \_\_\_\_\_

Best Times \_\_\_\_\_

## Buyer Consultation Prequalification Questions

- Has an agent taken you out and shown you any properties? Yes No  
If yes: How's that going? \_\_\_\_\_
- Is anyone else buying the house with you? \_\_\_\_\_
- Who will be living in your home? \_\_\_\_\_
- How long have you been looking for a home? \_\_\_\_\_  
Have you seen anything that you like? Yes No If yes: Tell me about it.  
\_\_\_\_\_  
What prevented you from purchasing it? \_\_\_\_\_
- I'm just curious, why are you moving? \_\_\_\_\_
- Are you renting or do you own the place where you are living now? Rent Own (circle one)  
Renter: Do you know when your lease is up? \_\_\_\_\_  
Owner: Do you need to sell your current home before you buy your next home? Yes/No  
If yes: Have you signed a listing agreement with a real estate agent to sell your home?  
Yes / No  
If no: When would be a good time for us to get together so I can give you a free  
market analysis on your home? \_\_\_\_\_
- Are you going to be paying cash or will you be getting a mortgage for the purchase of your  
home? Cash Mortgage (circle one)  
Mortgage: Have you already been preapproved by a lender? \_\_\_\_\_  
If yes: Who are you working with? \_\_\_\_\_  
What is the amount you are preapproved for? \_\_\_\_\_  
What will your down payment be? \_\_\_\_\_

Continued

*If you want to recommend a lender:* I have three trusted lenders who always provide top quality service. They often help buyers save money either on a monthly basis or on initial costs. Would you like their contact information?

*If not preapproved:* One of the first things home buyers need to do is get preapproved financially. I have three trusted lenders who always provide top quality service. They often help buyers save money either on a monthly basis or on initial costs. Would you like their contact information?

- 8. What price range do you feel comfortable with? \_\_\_\_\_
- 9. Is there anyone else who will be involved in your home buying decision? \_\_\_\_\_  
\_\_\_\_\_
- 10. On a scale from 1 to 10, with 10 meaning you must buy a home as quickly as possible and 1 meaning you are not sure you'll really buy anything, how would you rate yourself? \_\_\_\_\_  
*Anything less than 10:* What would it take to become a 10? \_\_\_\_\_
- 11. When do you need to be in your new home? \_\_\_\_\_
- 12. I'd love to help you buy a home. In order to help you find a perfect home, all we need to do is set an appointment (with all of the decision makers) so I can help you get what you want in the time you want. What is a better time for us to meet, day at time , or alternate day at alternate time?

Appointment date and time: \_\_\_\_\_

Other Information

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Information to Remain Confidential

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Behavioral Style: D I S C

# Out-of-Town Buyer Lead Sheet (prompts)



Date: \_\_\_\_\_ Lead Source: \_\_\_\_\_

Contact Info	
Name _____	
Email _____	
Current Address _____	Children (names/ages) _____
Home # _____	Cell # _____
Work # _____	Fax # _____
Best way to get in touch _____	Best Times _____

## Buyer Consultation Prequalification Questions

1. Already working with a buyer's agent? \_\_\_\_\_  
Is this a single purchaser? Yes No *If no, who else?* \_\_\_\_\_
  2. People who will live in the house \_\_\_\_\_  
\_\_\_\_\_
  3. Reason for the move \_\_\_\_\_  
*Job transfer: Relocation company involved?* \_\_\_\_\_
  4. Started looking for a home? Yes No *If yes, see anything good? Yes No*  
*If yes, description* \_\_\_\_\_ *If no, why not?* \_\_\_\_\_  
Reason for not purchasing \_\_\_\_\_  
\_\_\_\_\_
  5. Date of move \_\_\_\_\_  
Moving into new home upon arrival? Yes No Maybe  
*No or Maybe: Need transitional housing?* \_\_\_\_\_
  6. Current situation: rent or own? (circle one) *Own: Need to sell existing house in order to buy?* Yes No *If yes, where?* \_\_\_\_\_  
Have a listing agent? Yes No  
*If yes to have an agent, who?* \_\_\_\_\_ Phone: \_\_\_\_\_  
Recommend listing agent? Yes No *If yes, who* \_\_\_\_\_
  7. Method of financing: cash or mortgage  
*Mortgage: Preapproved by a lender?* Yes No  
*Preapproved: Lender's name* \_\_\_\_\_ Phone \_\_\_\_\_  
*Mortgage amount* \_\_\_\_\_ *Down payment amount* \_\_\_\_\_  
Recommend lenders? Yes No *If yes, who?* \_\_\_\_\_
  8. Preferred price range \_\_\_\_\_
  9. Date of trip to look for property \_\_\_\_\_
  10. Level of urgency to buy: 1 2 3 4 5 6 7 8 9 10  
*Anything less than 10: What would it take to become a 10?* \_\_\_\_\_
  11. Appointment date and time: \_\_\_\_\_
- Other Information \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Need for confidentiality \_\_\_\_\_  
Behavioral style: D I S C

# Out-Of-Town Buyer Lead Sheet (scripts)

Date: \_\_\_\_\_

Lead Source/Property that prompted call: \_\_\_\_\_



## Contact Info

Name \_\_\_\_\_

Email \_\_\_\_\_

Current Address \_\_\_\_\_

Children (names/ages) \_\_\_\_\_

Home # \_\_\_\_\_

Cell # \_\_\_\_\_

Work # \_\_\_\_\_

Fax # \_\_\_\_\_

Best way to get in touch \_\_\_\_\_

Best Times \_\_\_\_\_

## Buyer Consultation Prequalification Questions

1. Are you currently working with a real estate agent to find a home in *your city*? Yes No  
If yes: How's that going? \_\_\_\_\_
2. Is anyone else buying the house with you? \_\_\_\_\_
3. Who will be living in your home? \_\_\_\_\_
4. Have you started looking for a home? Yes No  
If yes: Have you seen anything that you like? Yes No  
If yes: Tell me about it. \_\_\_\_\_  
Are you currently pursuing it? Yes No If no, why not? \_\_\_\_\_
5. What is bringing you to *your city*? \_\_\_\_\_  
Job transfer: Does your company require you to use a relocation company or in-house relocation department? \_\_\_\_\_
6. When are you moving to *your city*? \_\_\_\_\_  
Any response: Will you be moving into your new home as soon as you arrive? \_\_\_\_\_  
If no: Do you need transitional housing? \_\_\_\_\_
7. Are you living in a home that you need to sell before you buy your next house? Yes No  
If yes: Would it be all right if I have a highly qualified real estate agent in your area give you a call to provide a free market analysis on your home? \_\_\_\_\_
8. Are you going to be paying cash or will you be getting a mortgage for the purchase of your home?  
Cash Mortgage (circle one)  
Mortgage: Have you already been preapproved by a lender? \_\_\_\_\_  
If yes: Who are you working with? \_\_\_\_\_  
What is the amount you are preapproved for? \_\_\_\_\_  
What will your down payment be? \_\_\_\_\_  
If you want to recommend a lender: I have three trusted lenders who always provide top quality service. They often help buyers save money either on a monthly basis or on initial costs. Would you like their contact information? \_\_\_\_\_  
If not approved: One of the first things you need to do is get preapproved financially. I have three trusted lenders who always provide top quality service. They often help buyers save money either on a monthly basis or on initial costs. Would you like their contact information? \_\_\_\_\_

*Continued*

9. What price range do you feel comfortable with? \_\_\_\_\_

10. When are you coming to *your city* to look for your home? \_\_\_\_\_

11. On a scale from 1 to 10, with 10 meaning you must buy a home as quickly as possible, and 1 meaning you are not sure you'll really buy anything, how would you rate yourself? \_\_\_\_\_

*Anything less than 10: What would it take for you to become a 10?* \_\_\_\_\_  
\_\_\_\_\_

12. The one other thing we need to do is set an appointment so I can help you get what you want, for the best price, in the time you want. What is a better time for us to meet, *the day you arrive* or *next day*? Appointment date and time: \_\_\_\_\_

Other Information

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Information to Remain Confidential \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Behavioral style: D I S C

# Prelisting Lead Sheet (prompts)



Date: \_\_\_\_\_

Contact Info	
Name	
Email	
Current Address	Children (names/ages)
Home #	Cell #
Work #	Fax #
Best way to get in touch	Best Times

## Motivation

- Why are you moving? \_\_\_\_\_
- Moving to \_\_\_\_\_
- Already working with a buyer's agent? (check one)     yes     no  
 If yes, have you signed an agreement?     yes     no
- How soon do you need to be there? \_\_\_\_\_
- Corporate relocation assistance?     yes     no
- Considering FSBO?     yes     no
- Level of motivation: (circle one)            1    2    3    4    5    6    7    8    9    10

## House

- Tell me a little about your house \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
- Square feet? \_\_\_\_\_ Bedrooms \_\_\_\_\_ Bathrooms \_\_\_\_\_
- Type of house / stories \_\_\_\_\_
- Owned \_\_\_\_\_ years
- Updates to house \_\_\_\_\_  
 \_\_\_\_\_
- Pool?     yes     no
- Rate your home on a scale of 1 to 10 \_\_\_\_\_
- What would make it a 10? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



**Financials**

- 16. How much do you think the house is worth? \$ \_\_\_\_\_
- 17. You owe \$ 1st \_\_\_\_\_ 2nd \_\_\_\_\_ LOC \_\_\_\_\_
- 18. You want to net \$ \_\_\_\_\_
- 19. Up-to-date on payments?  yes  no
- 20. Sole owner of the house?  yes  no

**Tracking & Conversion**

- 21. How did you hear about our team? \_\_\_\_\_
- 22. 3 things you expect from a realtor:
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_
- 23. Interviewing other realtors? Whom? \_\_\_\_\_

**Other Information:**

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“Let’s set an appointment to meet so we can find out exactly what you want. This appointment should last 30 minutes to an hour. We’ll go through the home selling process and talk about your expectations and your goals.”

**Would \_\_\_\_\_ or \_\_\_\_\_ be a better time for you?”**

**Appointment Date:** \_\_\_\_\_ **Time:** \_\_\_\_\_

# Prelisting Lead Sheet (Scripts)



Date: \_\_\_\_\_

Contact Info	
Name	
Email	
Current Address	Children (names/ages)
Home #	Cell #
Work #	Fax #
Best way to get in touch	Best Times

## Motivation

- Why are you moving? \_\_\_\_\_
- Moving to \_\_\_\_\_
- Already working with a buyer's agent? (check one)     yes     no  
 If yes, have you signed an agreement?     yes     no
- How soon do you need to be there? \_\_\_\_\_
- Will you be receiving any corporate relocation assistance?     yes     no
- Are you thinking about selling your home as a FSBO??     yes     no
- On a scale of 1 to 10, with 10 being extremely urgent, how motivated are you to sell your house?  
 (circle one)    1    2    3    4    5    6    7    8    9    10

## House

- Tell me a little about your house \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
- How many square feet is your house? \_\_\_\_\_ How many stories? \_\_\_\_\_  
 How many bedrooms does it have? \_\_\_\_\_ How many bathrooms? \_\_\_\_\_
- How many years have you owned the house? \_\_\_\_\_
- Have you done any updates or work on the house since you've owned it? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
- What would make it a 10? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## Motivation

- Why are you moving? \_\_\_\_\_
- Where are you moving to? \_\_\_\_\_
- Are you already working with a buyer's agent? (check one)     yes     no  
 If yes, have you signed an agreement?     yes     no

16. How soon do you need to be there? \_\_\_\_\_
17. Will you be receiving any corporate relocation assistance?    fi yes    fi no
18. Are you thinking about selling your home as a FSBO?    fi yes    fi no
19. On a scale of 1 to 10, with 10 being extremely urgent, how motivated are you to sell your house?  
(circle one)        1   2   3   4   5   6   7   8   9   10

### House

20. Tell me a little about your house \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
21. How many square feet is your house? \_\_\_\_\_ 10. How many stories? \_\_\_\_\_
22. How many bedrooms does it have? \_\_\_\_\_ 12. How many bathrooms? \_\_\_\_\_
23. How many years have you owned the house? \_\_\_\_\_
24. Have you done any updates or work on the house since you've owned it? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
25. Does it have a pool?    fi yes    fi no
26. Rate your home on a scale of 1 to 10 \_\_\_\_\_
27. What would make it a 10? \_\_\_\_\_  
\_\_\_\_\_

### Financials

28. How much do you think your house is worth? \_\_\_\_\_
29. How much do you owe on your mortgage? \$ 1st        2nd        LOC \_\_\_\_\_
30. How much do you want to net on your home? \$ \_\_\_\_\_
31. Are you up-to-date on payments?     yes     no
32. Are you the sole owner of the house?         yes     no
33. If not, who else is on the title? \_\_\_\_\_

### Tracking & Conversion

34. How did you hear about our team? \_\_\_\_\_
35. What are the three things you expect from a realtor?  
a. \_\_\_\_\_  
b. \_\_\_\_\_  
c. \_\_\_\_\_
36. Are you interviewing any other realtors? Whom? \_\_\_\_\_
37. Have you made appointments with any of them? When? \_\_\_\_\_

“Let’s set an appointment to meet so we can find out exactly what you want. This appointment should last 30 minutes to an hour. We’ll go through the home selling process and talk about your expectations and your goals.”

Would \_\_\_\_\_ or \_\_\_\_\_ be a better time for you?”

Appointment Date: \_\_\_\_\_ Time: \_\_\_\_\_

Notes

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