

## Real Estate Agent's Methodology and Process to Manage a Buyer Business

### Overview

- Humans follow predictable behavior patterns or models
  - The Five Stages of Grief (Doctor Visit)
  - The Stages of Purchase and Buying Decisions
- Know what the roadblocks are, weaken them up front, and be prepared
  - Procrastination
  - Thinking about it
  - Fear of market change or making the wrong decision
  - Expectations too high. Desire home higher than budget
  - Stress of process or move
- **We are successful to the point we are successful helping people move to the next stage and to feel comfortable in taking these actions. (This is mostly done without the client thinking about it)**
- Be aware of opportunity
- Put each buyer/lead into this process
- Only work with buyers who will move into this buyer process
- Still follow up to see if you can move them into the process
- Concentrate on moving each buyer to the next step only
- Complete that step, then concentrate on moving the buyer to the next step
- Work with as many buyers as you want
- Close escrow
- Follow up for referral business and repeat business
- Other conversation tips

### The Steps

1. Be aware of potential opportunities when they appear.
  - a. What might they look like?
2. Find out what your client's interest is and what may motivate them to move forward, then obtain an agreement to talk to them at a later time to discuss in more detail.
  - a. Interview them for:
    - i. Wants (ideal)
    - ii. Hang-ups to start the process
    - iii. Hang-ups on why they may work with someone else
  - b. What if...
    - i. ...we can help you obtain your goal without you having the trouble you believe you may have? Would you want to move forward?
    - ii. ...you do not move forward? Are you okay with not improving your lifestyle when you can?
  - c. Arrange time to talk at a later time on the phone.
  - d. How to get control of a floor call
  - e. How to get control of an open house lead
3. Telephone conversation: talk about the simple steps to move forward. Explanation of the process.
  - a. Interview Questions
    - i. What is important?

- ii. Size
    - iii. Neighborhood
    - iv. School districts
    - v. Price or is it payments
    - vi. Lot size
    - vii. Pool
    - viii. If you get what you want for the right financial terms, how will you feel about that? Just okay, or really good?
  - b. Present your services
  - c. Sell your loan officer, then get permission for loan officer to call
  - d. Set appointment for pre-showing discussion at their home or office
    - i. This is to preview information with them and to find out what is really important for them.
    - ii. Show them types of property (pictures)
    - iii. Set up times to show properties for starting process of learning the market.
- 4. **Loan officer presentation and pre-qualification**
  - a. **Big Valley Mortgage**
- 5. **Pre-showing appointment discussion**
  - a. Introduction
  - b. It is an emotional process.
  - c. California Real Estate Outlook
  - d. The first house you see is your “Best Choice”
  - e. Explain how the negotiations work
  - f. Pre-view contact and important issues
    - i. Who pays the closing costs
    - ii. What is negotiable and what is normal
    - iii. Time of escrow
    - iv. Time for inspections
  - g. Preview MLS Listings
  - h. What is more important
- 6. **Showing Property**
  - a. **Keep them on the track to make a decision**
    - i. If you had to, which property would you choose between your top choice and the last home we saw? Why?
    - ii. Bring them back to reality whenever they start traveling into fantasyland.
    - iii. Remind them that getting what they want for the long haul is more important than being tough in negotiating and not getting what they want. Do they want to be happy?
    - iv. Diminish the impact that 5 to 50 thousand dollars will have on the purchase
    - v. Do not sell them on a home. Instead, move them towards making a decision.
- 7. **Writing an offer**
  - a. Writing a strong offer
  - b. Leave the door open for options. (Don’t get caught up in the details, get what you want)
  - c. Time is of the essence
  - d. Do not do anything verbally with anyone. You need signed contacts.
- 8. **Escrow**
  - a. Great service (lots of communication)
  - b. Go to signing!

9. **Follow up for repeat and referral business**

10. **Other conversation tips**

- a. Do not make statements that cannot be logically argued
- b. Always ask questions.
- c. When asked a question, answer it, then immediately ask a question of your client
  - i. (Usually in the beginning process until a relationship is established)
- d. Instead
  - i. Tell stories
  - ii. Give your opinion (clearly stated based upon your personal experience)
  - iii. Ask the client specifically why they feel or think a certain way and offer a different perspective but only as such.

**Step 1: Be aware of potential opportunities when they appear.**

Many times as professional Realtors and loan officers we are presented with opportunities to develop clients, but we are not quite sure how to handle them comfortably for ourselves or where our potential clients feel comfortable being moved along in a decision making process.

So we lose thousands to tens of thousands of dollars each year because we do not learn how to recognize the opportunities and then how to capitalize on them for the benefit of our businesses and the benefit of our clients' objectives.

So what do these potential opportunities look like? Or rather, what do they sound like?

Some examples:

**"I got your letter the other day and I have been thinking about investing sometime in the future. When I get serious about it, I will give you a call."**

**"I am thinking about buying my first house, maybe in a year or two, but I have to pay off some debt and save some money first. But when I am ready I will call you."**

**"What is the market like right now?"**

**"What are the interest rates right now?"**

**"What did that house sell for?"**

These are opportunities to turn these people into clients *right now!*

Why will they turn into clients now?

Because they are interested in some type of benefit that a certain real estate transaction may give them, and we are going to show them how they can do it now!

Who wants to wait to get the benefits of anything when you can get it now?

**Step 2**

**A) Find out what their interest is and what may motivate them to move forward in the process sooner.**

**B) What if...**

**C) Set a time to talk on the phone later in more detail**

This step's objective is to ensure that you have enough information that will allow you to develop curiosity and interest so you may be able share in a future conversation and then arrange time to speak on a business level.

**Getting potential clients out of the starting blocks.**

To develop enough curiosity and interest, we need to know more about what a person is really interested in and what might be holding them back from moving forward.

We will already know that they are putting action off to a later date when they say that are waiting until spring, next month, next year, until something of significance happens, etc.

To obtain information we must ask questions.

Acknowledge what is said.

Say: **"That sounds good. When that time comes, would you possibly be open to me having an opportunity to earn your business?"**

**Great!"**

Then say: **"Oh by the way or "One more thing" or "One question I have for you"**

**"By waiting until that time, what benefit are you trying to achieve? The reason I am asking this is because sometimes I am able to help clients with certain issues faster than they anticipated.**

**What is the goal you want to obtain by waiting?"**

The potential client may answer with following statements shown large bold type. The regular indented bold text is conversation suggestions for you to get more information:

**"I am waiting to save a down payment."**

**"That sounds good. When that time comes, would you possibly be open to me having an opportunity to earn your business?"**

**Oh, by the way, how much are you hoping you will save up?**

**How long do you think that may take you?**

Do you know that will only save you about (70 dollars per \$10,000) in a monthly payment and that it looks like the market while you are waiting (months) could go up (%) which would equal (% times amount of median price house)?

What if:

Let me ask you this question, if you could get in without having to save that amount of money and keep all the appreciation you would have to pay someone else for; (Which they earned over the time it took for you to save your amount of money) would you want to do it now, or do you at least think you would want to consider it?

Arrange a time to talk later on the phone:

Well, I can't go into all the details right now, but if you would like I can give you a call tonight or tomorrow and I can tell you more about how we *may be able* to move the process forward for you faster. Would you like to discuss that a little?

**"I need to decide if I really want to sell my home and move out of the situation I am in now, I just starting to try and figure it out..."**

I totally understand, making a significant change like that, definitely deserves a tremendous amount of thought. If and when that time comes I would love to make a bid to potentially earn your business, *if* you would be open to that.

Great.

By the way, I know when I have had to make a decision about significant changes in my life the process of thinking about it is always so much clearer when I have really good numbers to consider and most of the facts in hand...

Tell me... what has spurred these thoughts of moving?

What kind of concerns do you have if you do move?

What kind of concerns do you have if you do not move?

What if:

Let me ask you this question: If you could sell your home and get top dollar, go out and find a home that improves your life and your lifestyle the way you dream of; and your payments on your new loan were reasonable and in your budget; and you had what you want without financial stress, would you like that?

Arrange a time to talk later on the phone:

**Well, I can't go into all the details right now, but I have helped a lot of people in your situation getting some hard numbers so that when they are thinking about their decision they are thinking about their choices with real numbers not abstract numbers. And the truth is you have to have real numbers to really come to any conclusion at all, right? If you would like I can give you a call tonight or tomorrow**

and I can help you put together some numbers you can use in your thinking process, would you like that? Would there be any downside to that?

How would you deal with these questions following the above formula?

“I think I will get a better deal in (whatever time frame or period).”

“Need to figure out some of my personal finances first.”

“I wanted to pay off some loans first before I buy something.”

“I need to fix some credit issues.”

**Telephone conversation: talk about the simple steps to move forward.  
Explanation of the process.**

Realtor calls and talks with client, asks basic questions, answers basic question and gets them excited about moving forward.

**Realtor:**

**Interview**

Hi (name of client) this is (your name)

How are you? (Small Talk: brief)

Do you have a few minutes to talk?

Well tell me, in a perfect world what is it you are trying to do or would like to?  
(Confirm by taking specific details out and underline the general motivation and goals.)

\*\* First time buyers ***only ask first three***

- Area
- Bedroom / Bath
- Newer or Older
- Size of Home
- Lot size
- Schools?
- Pool
- Etc.

Is there anything important about the process to you specifically we should talk about?

What is the catalyst of you thinking you want to move or make a change?

What is your biggest fear or holdup in your mind to move forward sooner than later?

What is your biggest fear or holdup of moving forward later than sooner?

Is the price of the home a big concern or ***is it really*** the down payment and monthly payments that are the most important to you?

Speaking of payments, you may not realize this but there are some unbelievably great programs out there right now that might make some sense for you.

Have you spoken to a lender ***in the last month*** about what you may qualify for?

**If so:**

Do you know ***exactly*** what your payments are, including principle, interest, taxes, insurance and mortgage insurance if needed?

Do you know ***exactly*** what your out-of-pocket expenses would be including down payment, underwriting fees, title fees, escrow fees, impounds, etc.?

If you had that information in hand, I am assuming that it would be helpful to make a decision moving forward. Do you agree?

**If Not**

If you knew exactly what your payments would be including principle interest tax and insurance would be and exactly what your out-of-pocket expense would be including down payment, I am assuming that it would be helpful to making a decision about moving forward or not. Do you agree?

### **Present your services**

Well, let's talk a little about the process we go through when I am dealing with a client in similar circumstances...

First of all my goal is to provide the very best service possible. My task is to absolutely cater to all of our clients' needs so that any transaction I am involved in achieves the goals my client desires. All of my business comes from word of mouth so this is imperative to the continued growth of my business.

***I am usually able to accomplish this task of creating very satisfied clients, by going through the following process.***

The first thing is to make sure that you have all the information you need to make good decisions. My personal belief is that the more I educate my clients on the market, current trends, inside information etc., the less I need to really do any selling. Because the more my clients know, the more they are able to make good choices about their own desires and life. I never want to presume that I know better than my clients do about the choices they make so long as they have all the information they need to make those decisions.

The first thing to do is to take a look at what the real cost are going to be.

Number one is the money picture.

1. If you have a house to sell, what could we get for it and what will you walk away with as far as net proceeds go?
2. How much can you qualify for and what are your exact payments and out-of-pocket expenses going to be?

Number two is to figure out what type of home you can buy for those dollars. Does it look likely you will be able to achieve your desires under financial terms you can live with?

Then we start this process of bringing you up to date on what is happening in the market segment you are most interested in.

What homes are on the market now?

What has sold?

How fast did they sell and what were the pricing trends?

This way when we come across a great deal, you will be able to act with confidence.

We continue this process until we find a home you would like to buy.

Then we go to the next step, which is negotiating an offer. I can talk a lot more about that later.

Finally, I walk you through the escrow process, making sure everything goes smoothly.

So that is the basic process we go through.

### **Sell your Loan Officer**

I would like to make a suggestion if I could.

I think the first place we should start is with my lender, who is absolutely great with clients and great with pricing. I would like to have this person call you to see if we can't get the first part of the puzzle in place. He will be able to easily get some hard numbers to use when considering your choices. Would you be open to that?

Great, his/her name is (loan officer's name) and I will have them call you tomorrow or the next day. Sound good?

### **Loan officer presentation and pre-qualification**

#### **Big Valley Mortgage**

1. **Phone Interview**
2. **Research**
3. **Face to Face Meeting**

### **Pre-showing appointment discussion**



## Introduction and Rapport Building:

Ask for a glass of water by saying “May I pardon you for a glass of water?” It will allow you to small talk before getting down to business.

## Recognize and empathize with how unsettling it is to move and buy a new home.

“You know, that you are starting a process that you may have gone through before, however, it still remains that this process of buying, selling, real estate transactions that are dealing with hundreds of thousands of dollars, making a commitment to payments that usually are larger than what **we are truly** comfortable with is . . . an emotional issue!!!

The frustrating thing about real estate is that you have to rely on **so** many different people. You not only need to rely on your agent and your loan officer, but you must also rely on the other person’s agent, the other principle, the processing people, the underwriters, the escrow officer and the people who do title searches, the people in the bank who review the files for funding, the termite people, the appraisal people and so on and so on.

If one person messes up, the deal could go sideways. This is why it is so important to have the right people working for you—people who are detail oriented, who know how to follow up and make sure that deal is moving ahead in the appropriate manner.”

## Central Valley / California Real Estate Outlook.

### What is happening now...

### The first house you see is your “Best Choice”

When you start this process of choosing a home and house hunting I would like to make a suggestion that many of my clients have found helpful. When looking at so many homes many people will try and keep all of them in their minds for comparison. They will remember a house with a nice master bedroom and another house with a nice backyard and another that was in a great neighborhood. These homes will start to blur in their minds and the process can become very frustrating. Even highly sophisticated clients will start a process of wishing for combinations of the homes they saw. (They want one neighborhood, with a house on it from a lower priced area, with a home on another street’s lot!) This is of course not possible, and if it were, the price on the home would be greatly increased.

So my suggestion is to realize that the first home you preview is the very best choice you have... **so far**.

Then when you see the next home, compare it to the best choice up until that point. Compare everything as a whole package. The house, the lot, the neighborhood, the condition, the price, the updates etc. Make a choice out of the two which is the very best choice you have **so far**.

Once that choice is made, discard and forget about your second choice. It does not matter at this point anymore, for any reason.

## Negotiating

When you go through this process, in most cases you will look at 5, 10, 20 or more homes, and somewhere along the line it is likely you will find a home that clearly seems to be the very best deal for you and your desires.

You will get a feel for it even before you go into the house if you are like some of my other clients. It usually starts with a feeling of anxiety or excitement. The more homes you have seen, the stronger the feeling. You make the decision that this is the best choice.

Now we need to negotiate a contract. You need to know that in most cases there are other buyers who may be recognizing the same value you are. Realizing that you may have competition, it is important to be realistic about the negotiating process and also to remember what is important. What do you really want?

Therefore, when writing an offer, I suggest that you write the strongest offer you can minus a little. I say minus a little so that we have something to play with and we are not drawing a line in the sand so to speak. I believe that is best to put your best offer on the table, because if you play games, your offer will be used as leverage to get another offer or a more desirable offer higher.

I have seen this happen often. It is the way things work. It is not always like that and it does not happen in every situation, but it's something to keep in mind.

On the other hand, if we find a property that has been on the market a while, then it may make sense to write a low offer and just see what happens. But in most cases, a property will have to have been on the market at a certain price for several weeks before most will consider accepting much lower prices.

### **Pre-view contact and important issues**

#### *Take copy of contract*

When we are making an offer, we will actually be writing the contract itself. I have brought one along for just in case you are interested.

I would like to point out to you a couple of things in here, which are important, and protections for you.

The first item is the offered price under number 1c.

The second important issue is the size of the deposit under number 3a. I will fill out your financing information here for you based upon what (lender's name) and you agree on.

The third area to talk about is section H (loan contingency) The offer I suggest we write will be contingent upon the value appraising at the sales prices or higher by a third party neutral appraiser to ensure you do not overpay for this house. If the home does not appraise for that value or higher, you can cancel the contract and obtain your deposit. If your loan is not approved we can also back out of the deal and have the deposit returned to you

Item 4a allows us to suggest who pays for any pest inspection. It is customary for the seller to pay for these reports and we will do so in our agreement.

Item 4b lists other inspections. It is customary for the buyer to pay for these inspections. I highly recommend a whole house inspection. I can arrange this for you, and depending on the property, I may recommend a few others.

Items 4d and 4e covers who pays for escrow fees, title fees and transfer taxes. These can be paid by the seller totally or the buyer totally but most times are often split.

Item 9 basically says that the home is sold in its present condition as of the date of acceptance. This means that unless otherwise agreed that the seller is not going to fix specific items, and the home will be sold as-is. The owner is by law obligated to tell you everything about the property that may adversely affect the desirability. In addition to that, the buyer has the right to conduct investigations of the entire property to determine its present condition since the seller may not be aware of all of its defects.

Items 10 and 14 are the time periods in which the buyer can cancel the contract. We will have 17 days to do all inspections and move forward, cancel the agreement, or make a request for the seller to make repairs. ***If we need to get out, we can.*** All you need to do is cancel the agreement.

That is the important stuff the cover for now. Other details we can get into later when it comes time.

### **Preview MLS Listings**

*Bring printout of sold, pending and active listings with pictures (as many as you can).*

I have brought some stuff for us to review.

Let's first look at what has sold most recently.

What do you like about these homes?

Now let's look at what is active.

Now let's look at what has sold in the last 6 months. (Point out gains in price and time period.)

What is more important?

HYPOTHETICALLY

- a. What if you found a great deal and a great house but it did not have X
- b. What if you found a great deal and a great house but it did not have Y
- c. Etc.

Going back to these homes that are on the market right now, which ones would you like to preview to ***start the process of learning the market?***

When is a good time for you?

***(Get both people in the car; this is critical.)***

### **Showing Property**

When showing property your objective is the help them keep in mind the following.

1. The Big Picture

- a. What is the big picture? It is the idea of improving their overall lifestyle and for them to have the things in life they deserve and want. They have worked hard and this is their privilege.
  - b. What is the small picture? Little details that will not matter 5 years from now. If it won't really matter 5 years from now, do not get caught up in it.
2. What is most important to the client when making choices? Help them figure out what is most important by asking them and requiring they answer you. These questions come up as they are trying to decide which home is the best choice. Encourage them to think out loud with you.

Agent Scripts below

- a. ***“What is really most important to you the client? Being in the best neighborhood with less of a house, or having more house in a good neighborhood?”***
3. To keep a running tally of which home is the best choice. It is best to encourage them to give you an answer of what their feelings are between their best choice and the last home they looked at ***before*** you show them the next one.
  - a. **Agent Script** “If you had to make a choice now, looking at each house, with their respective prices, on their respective lots, with their respective conditions, in the respective neighborhoods, which would be your choice? Why do you feel that way?”
4. Eliminate thinking about homes that are not your best choice
  - a. **Agent Script** “Well if that is why you feel that way, I also feel that is a good choice so for now let's call (their choice) your best choice for now and compare the next home to that best choice. Fair enough?”
5. Keep them out of fantasy land. From time to time a client will suggest that they would like to have one particular home on a different particular lot transplanted into a different neighborhood with the price of the lowest home they have seen thus far. It is critical to remind them that they do not have that choice to consider. Saying nothing or saying we will keep looking gives them hope that it may exist. This is a super critical point.
  - a. **Agent Script** “Well that would be great if we could do that, unfortunately we cannot put that home on that lot and move it to this neighborhood. And even if we could, the price of that home would be out of our price range. So it nice to think about, but we need to make sure that we can concentrate on making the best decisions out of real choices we have.
  - b. **Agent Script** “You know it is funny you bring that up, because with all of my clients it does not matter if they are qualified for \$200,000 or a million dollars, the perfect home is always about 20% more then what they qualify for. It is human nature. What is most desirable is that which is just out of reach ‘for the time being’. However, once it is in reach the desirability falls. And the truth is I am no different. Most of my clients though do readjust their sights eventually to what in their price range and find something that is really good. But the fact is that initially our mind moves us toward what is just out of reach because maybe it is safe.
6. Keep in your client's mind what the real cost is to them. Our clients usually are not paying cash for a property. What they are paying is a down payment and monthly payments. So if they see a home they would like to buy, but it is more than what they wanted to spend, remind them of what the difference would be in the down payment and monthly payment.
7. Do not sell them on any particular home, but confirm and collaborate their likes and dislikes. Then sell the need for urgency. It is important not to try and use any closing process on clients. They will feel it and resent it. However, if you see that a client is really interested in a home you should reassure them of their choices. Remember, it is their choice, not ours. Everyone has different tastes, styles and judgment. If your client's are different than yours, know that it is

more important for your client to be happy with the purchase than for you to be. Then it is your obligation to remind them of the risk of waiting *if* this is the best choice and they are not ready to move forward. See below for a script for clients that are excited about a home but nervous about writing an offer, so they choose not to write an offer that day.

- a. **Agent Script** “I want you to know, that it is totally okay with me if you do not write an offer on this home and it is totally okay with me that you do not buy this home. What is important to me, is you get what you want. So the reason I bring this up is because as we have gone through looking at all these different homes, eliminating all of the best choices, educating ourselves on the market, we have come to a point that you guys seems pretty excited about this home. Knowing that does not mean that you should try and buy it, but oftentimes when clients get to this point, the moment of taking a step of writing an offer can be very scary even though they have an escape clause in the contract but still they wait. They go into a holding pattern. So they are stuck on what to do. So I have a simple exercise that may help you that I would like to walk you through, and then you can tell me what you want to do when we are done. Fair enough? Okay, I want you both to close your eyes. Really, I want you to close your eyes. Please keep them closed. Empty out all your thoughts. And I want you to move forward in time 2 or 3 days. You have thought about this home and with time you have become more comfortable and in fact you have decided you would like to buy the home. So you call me and leave a message, (let’s get together tonight and write and offer). You are now eagerly awaiting my call. I call you back shortly and tell you, ‘Hey I am glad you want to write an offer, however I have called the agent and I was told they have accepted another offer last night. It is already sold.’ Right now, I want you to go inside, into your gut with this situation and tell me how you feel. Because if you feel no loss, then you should pass on this home altogether, however if you feel a tremendous amount of loss then I would want to think about what you could do not to lose out on this opportunity to buy your best choice! What is it you feel inside?
- b. It is important to allow them to just sit with their feelings, allow their brain to process this exercise regardless of what they tell you. What they tell you may be defensive. Bless their choice, so that you are on their side and then they will reprocess the exercise later when you are not there in front of them, but do not be surprised when they call you an hour or two later and want to write an offer.

### **Writing an offer**

When you sit down with your client it is because they have made a decision on what their “Best Choice” is. Remind them of this as you make choices on the terms and condition of the offer. Discuss the points below and re-discuss them if they start getting away from the big picture.

1. If this is their “Best Choice” they are intelligent and surely other buyers will recognize it is one of the best buys on the market. This means they will have competition to win the property possibly.
2. If an offer does not look serious, it will only be used to get other offers by motivating other buyers to get their offers in.
3. A strong offer consists of
  - a. A significant deposit
  - b. A full or over price offer
  - c. A pre-approval letter
  - d. A conventional non-government loan.

- e. A short escrow.
- f. Reasonable request on closing cost
- g. Holding back just a little so that you do not seem inflexible, but putting close to your best foot forward.
- h. Keep it simple
  - i. Avoid asking for personal property (That can be negotiated afterwards or outside of escrow)
  - ii. Avoid asking for special terms. If it is important, get an acceptance and then once the competition is gone, open up the negotiations for the special terms but do not be attach to them. (Big Picture)

Negotiating an offer requires you to be persistent and to get everything in writing. Do not accept a verbal approval. It means nothing, especially if a much stronger offer comes in. You and your clients lose out. In addition, do not let your clients off the hook for signing documents. If they avoid doing it they are hedging somewhere and you will need to ask them what the issues are, because if they really want to move forward, they need to sign everything to protect their interest. Otherwise another offer could blow them out.

Time is of the essence. When you get a client this far, do not let up. Keep everything moving until you have a solid contract.

### **Escrow**

During the escrow period, make sure your clients are getting great service. Great service comes down to one thing: communication. The more you do it, the faster you get back with them, the more you update them, the more you explain, the happier they are going to be.

It is not necessary to be you giving your clients the information. But it does need to be someone who is one the ball and customer service oriented and who communicates the information as a person on your team being directed by you.

Individuals do not mind in most cases being handed over to a subordinate so long as it is not unexpected and they have confidence in the subordinate doing a great job. The way to have your clients have this expectation is to sell them on this person doing the work. You inform them that you have a great “associate” that is much better at crossing the t’s and dotting the i’s and you are so luckily to have them on your team. This person will be calling to follow up on the escrow process, and of course you will be monitoring all the time to make sure that you can jump in and provide your skill base if it is needed.

Last but certainly not least, go to the signing. This is so important. It is your job. If you have had an assistant managing the relationship for the most part then it is important to take the relationship over at the end.

### **Follow up for Repeat and Referral Business**

#### **Other Conversation Tips**

1. Do not make statements that cannot be logically argued
2. Always ask questions.
3. When asked a question, answer it, then immediately ask a question of your client

- a. (Usually in the beginning process until a relationship is established)
- 4. Instead
  - a. Tell Stories
  - b. Give your opinion (clearly stated based upon your personal experience)
  - c. Ask the client specifically why they feel or think a certain way and offer a different perspective but only as such.