

Performance Improvement Think Tank (PITT)
The BGRS Edition
Framework for a Superior Customer Experience

“I’ve learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”

— **Maya Angelou**

Summary

Throughout the summer of 2019, a group of high performing relocation and referral leaders from Berkshire Hathaway HomeServices and Real Living Real Estate network brokerages joined BGRS’ Broker Network leadership and HSF Affiliates Referral Channel Development to engage in a series of discussions around the relocating customer journey. Their conclusions and output are captured in this best practice summary document, along with samples and other resources.

*The group became known as the PITT Crew - short for **Performance Improvement Think Tank – The BGRS Edition**. Their stated objective/goal was as follows:*

Objective: *As a result of the PITT- BGRS Edition, Berkshire Hathaway HomeServices and Real Living Real Estate members of the BGRS Preferred Broker Network will achieve an average survey score across the network of 95% or higher. (OR)*

*In the form of the Four Disciplines of Execution (4DX) **Wildly Important Goal (WIG)** = (X to Y by when):*

WIG: *Improve the network’s average survey score from 92.61% (as of end of 2018) to 95% (or higher), by the end of 2019.*

The PITT Crew identified and addressed four key areas of focus necessary to deliver and achieve validation for a Superior Customer Experience:

- *Identification and recognition of the Customer Journey*
- *Specific actions to take at each interval during the lifecycle of the move*
- *The role and impact of communication on the Customer Experience; who should communicate, how often, when are the most critical times, and what are the most effective means*
- *The Customer Survey as part of the roadmap for the journey; it needs to be continually mentioned and validated throughout the entire customer experience at key intervals, in order to drive higher return rates and ensure higher survey scores.*

If stakeholders focus on these areas and administer just-in-time solutions when issues arise, their actions can influence the entire trajectory of the move. They can then anticipate a favorable evaluation of the customer experience vs. an after-the-fact discovery of dissatisfaction, with no opportunity to correct or impact the outcome.

The PITT Crew called out the need to more accurately evaluate the customer experience around the advocacy and representation by the agent and brokerage, vs capturing the customer’s satisfaction or dissatisfaction with certain aspects of the move or transaction that may be market driven or otherwise out of the direct control of the brokerage.

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Section ONE

BEST PRACTICES

Referral Leader engagement – multiple touchpoints, methods, timing

- ✓ Timed emails/eCards (See samples in Section Four)
- ✓ Welcome video from Referral leader and/or Referral Department
- ✓ Check-in phone calls and/or texts
- ✓ Use and direct your assigned agents to use your brand's CRM to schedule and track touchpoints and interactions with the customer/client

Agent Selection and assignment

- ✓ After first phone conversation with transferee
- ✓ Pre-position that you will check-in to ensure good agent match, after XX days
- ✓ Set up agent as customer/client advocate, no matter what the outcome

Agent positioning

- ✓ Agent mentioned in Referral Leader communique; attach photo, resume
- ✓ Agent video - YouTube/Videolicious
- ✓ Agent swap – how to handle? Pre-position with agent and ensure customer knows it's okay to request it, if the fit isn't there.
- ✓ Set expectations together
- ✓ Focus on the desired objective: high customer satisfaction

Communications – samples

- ✓ Use keywords (see list in Section Three)
- ✓ Email, phone, hand-written note, texts – communicate with transferee and with their spouse/partner (See samples in Section Four).

Timing of Communiques – stay in sync with the *Customer Journey*

- ✓ First call - upon receipt of referral
- ✓ First email - ditto
- ✓ First video - Once agent selected and assigned
- ✓ 10 days after initiation – check-in
- ✓ During key decision points/stress points in the life of a transaction:
 - First conversation - intro Referral Leader role; pre-position agent
 - Right when listed/right after first homebuying tour
 - 10 days in, how's it going?
 - After showings have occurred - test the water, see how they are feeling
 - Appraised Value has come in
 - Receipt of offer/making an offer
 - Offer accepted/turned down
 - Around inspections

- While in temp housing; during period when transferee may be in new location and family in departure location
- During Inspections, Contingencies
- Awaiting closing
- Right before survey goes out - Calendar BGRS Survey goes out 120 days after initiation
- After the sale follow-up, post-move - show you care; deliver on 'agent for life' promise

This is the Referral Leader's opportunity to ask how things are going. Opportunity to replace agent if needed to ensure customer satisfaction. How are you enhancing the transferee's journey throughout the transaction?

Referral Leader and agent should create a timeline of key 'events' in the life of the transaction and ensure heightened communication during those periods. Use and direct your assigned agents to use your brand's CRM to schedule and track touchpoints and interactions with the customer/client. **See an example of a timeline you can use in the Roadmap below.**

Both should remind transferee of agent's role in negotiation of sales or purchase; agent has fiduciary responsibility to negotiate in the best interest of client; help transferee and spouse/partner feel represented by brokerage in addition to RMC's role in counseling their move; show them properties that meet their needs; provide options and help them to see consequences of their actions. Develop trust.

Discuss BGRS Survey questions

- ✓ When, how often, by whom (ID best practice)
 - By agent on first appointment
 - During lifecycle of transaction
 - By Referral Leader in second communique and again near end of transaction
- ✓ How to drive increased survey responses
 - Discuss right from the start, how critical the survey process is; ask if at any time, they could not answer the questions affirmatively, they should speak with Referral Leader or Agent and allow service recovery
 - After each encounter or issue – mention the survey and confirm customer is satisfied and would rate the agent/brokerage favorably
 - Heads up from Referral Leader or Agent right before BGRS sends survey
 - Follow up right after confirmation of receipt of survey

Additional Ideas: How to increase the rate of return on customer surveys

- ✓ Referral/Relocation Department focus on the Customer Survey
- ✓ Communication and repeated mention of survey with customer, during the lifecycle of the move
- ✓ Signage in and around the office
- ✓ Celebration of survey results and discussion at office meetings
- ✓ Create a company award
- ✓ Include page in Marketing Proposals, buyer and seller presentations
- ✓ Leave a copy in the car when showing properties
- ✓ Leave a copy in the home after conducting Open House, along with a thank you note

- ✓ Have agents include survey message on their email signature when working with BGRS Customers
- ✓ Include reference in the video(s) you create
- ✓ Keep it top of mind and mention it again and again (as they do at auto dealerships and other businesses)

Use of Eleven Key Elements handout from rCertified curriculum

- ✓ Referral Channel rCertifiedSM Module 3 - Agents to have the conversation about Key Relocation HomeSale Programs and IRS Tax Implications, early in relationship, then again, during life of transaction.
- ✓ Agents - use the Eleven Key Elements handout/presentation page at first meetings; and/or send in advance and plan a special consultative call around it.
- ✓ Discuss how agent is trained to protect transferee benefits.

Use of other branded, proprietary tools – list

- ✓ Use Brand Tools to Create Memorable Impressions and Customize to the Transferring Family
- ✓ Example – Branded Buying Guides, Branded Lifestyle Planning Guide, Branded Global Website, etc.

How to separate the Outcome from the Advocacy

- ✓ Ask whether the transferee is on board with the change; how the spouse/partner and other family members are feeling about the move
- ✓ Ask what the brokerage or agent can do to help support the family's needs during this time.
- ✓ Discuss and Review the PROCESS
- ✓ Transferees from out of the area or country may be unsure of the process, because it differs from their previous experience; how you guide them through the process will impact their experience and influence the survey results.
- ✓ Use Buyer/Seller Guides to explain why they need real estate buyer/seller representation, what is the value? Explain the role of the real estate representative, why he/she is an important part of the team.
- ✓ Use a flow chart/process flow to detail all the steps in the lifecycle of a move. The agent is the 'GPS' for the entire transaction.
- ✓ Separate typical disappointments (didn't get enough showings; no one came to open house; didn't get the price they wanted or the first three homes they bid on), from the Outcome and how they felt about the experience of working with the agent/brokerage.

Be a consistent Champion for your city/area

- ✓ Always point out features of your market/city, to keep family excited about the new location

Be sensitive to regional and cultural differences – in speech, tone, pace, preferences

- ✓ Discuss what methods of communication are most effective and what frequency is optimal for the customer/spouse/partner. Don't assume you know who the decision maker is, or who will be completing the survey.

- ✓ Adjust to the comfort level of the customer; put yourself in their shoes.

Communicating with both parties to the transaction – in the way they prefer. Who will complete the survey?

- ✓ The only way to know how people want to be communicated with is to ask and observe. Proactively ask about both transferee and spouse/partner's preferred style. Texts often work well for busy folks who don't want to engage for longer than a minute or so.
- ✓ Be careful of the quality and timeliness of all communications; in case an issue arises, texts and emails form a paper trail.

How to Train agent teams differently/better, in order to create the framework for a superior transferee/customer experience?

- ✓ Review positive surveys and call out specific qualities the customer appreciated.
- ✓ Embrace the use of keywords throughout Referral Department and team communications.
- ✓ Role playing with agents, especially common objections in your market – re: price, etc.

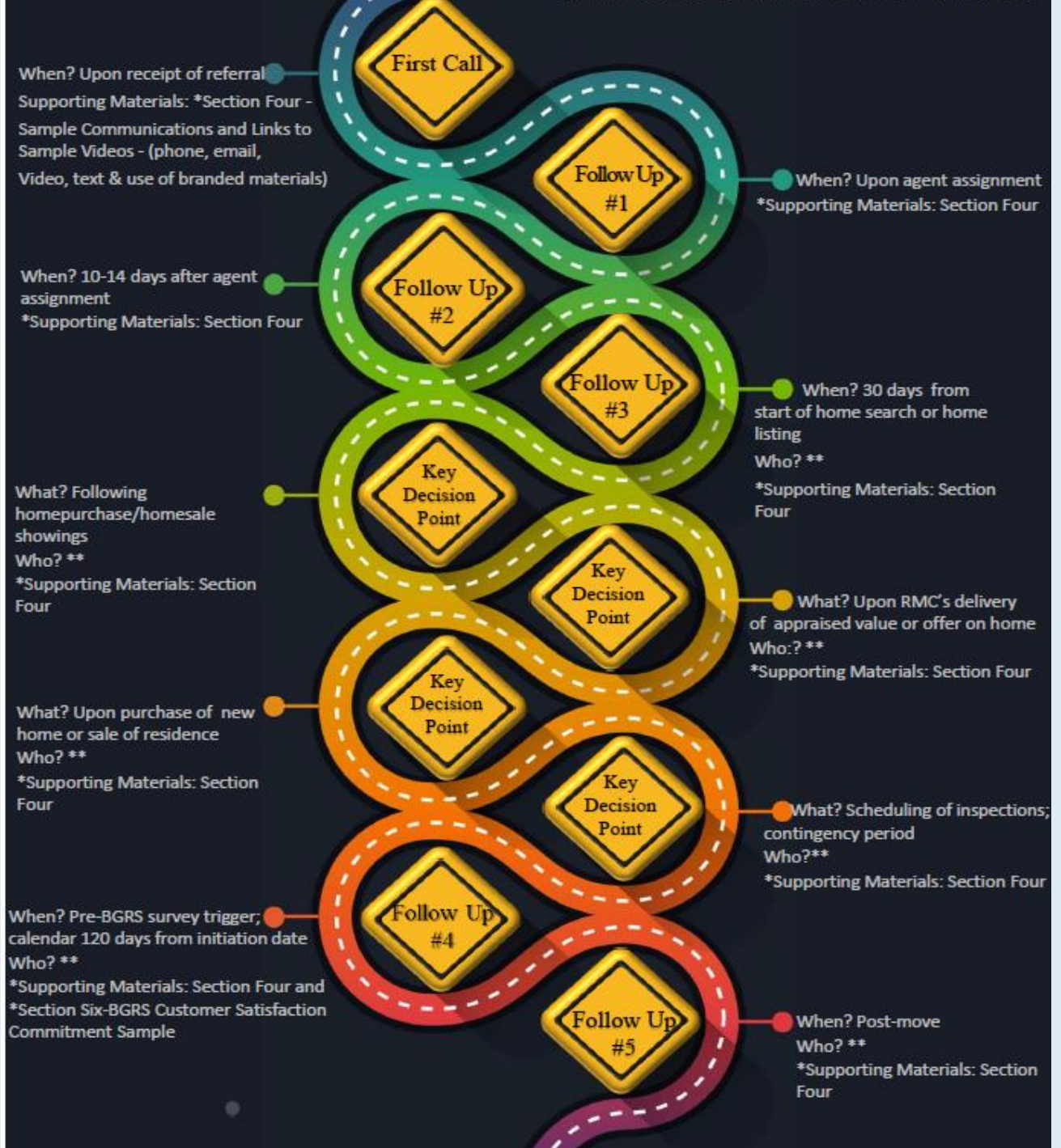
Ways to Communicate when normal methods are not available. How to communicate the emotional/non-tangible, esthetics that will meet their needs?

- ✓ Facetime and videos
- ✓ Insightful questioning - When you talk about a flat lot, what does that mean to you? Or a mountain view – do you want to back up to it or enjoy a far view? Can you send me a video to show me what you are seeking?
- ✓ For out-of-town buyers, walk through property/listing with them via video.

Best Practice: Referral Communication Roadmap

*See Performance Improvement Think Tank Document

**ID who is the driver at each turn: Referral Leader, Agent, Staff



Section TWO

PITT Crew – Member list and contact information

Aff ID	Brand	Company Name	First Name	Last Name	Email Address	Phone Number	Office Address	City	State	Zip
MO304	Berkshire Hathaway HomeServices	Alliance Real Estate	Michelle	Bennett	mbennett@bhhsall.com	(636) 733-5010	17050 Baxter Rd., Ste. 200	Chesterfield	MO	63005
TX208	Real Living	Beth Wolff REALTORS	Ed	Wolff	edwolff@bethwolff.com	(713)622-9339	1775 St. James Place, Suite 100	Houston	TX	77056
	BGRS	BGRS	Jaime	Barajas	jaime.barajas@bgrs.com	(480) 778-6454	16260 N. 71st Street, Suite 200	Scottsdale	AZ	85254
	BGRS	BGRS	Tia	Hamlin	tia.hamlin@bgrs.com	(631) 741-2664	16260 N. 71st Street, Suite 200	Scottsdale	AZ	85254
	BGRS	BGRS	Karen	Johnson	karen.johnson@bgrs.com	(480) 778-6908	16260 N. 71st Street, Suite 200	Scottsdale	AZ	85254
	BGRS	BGRS	Ashley	Herod	ashley.herod@bgrs.com	(480) 778-6348	16260 N. 71st Street, Suite 200	Scottsdale	AZ	85254
CA301	Berkshire Hathaway HomeServices	California Properties	David	Foggiano	dfoggiano@bhhsca.com	(858) 792-3390	12770 El Camino Real, Ste. 100	San Diego	CA	92130
NC301	Berkshire Hathaway HomeServices	Carolinas Realty	Cecily	Durrett	cecily.durrett@bhhs Carolinas.com	919.695.2300	3700 Computer Drive 27103	Raleigh	NC	27609
CA326	Berkshire Hathaway HomeServices	Drysdale Properties	Jill	Wylie	relocation@bhhsdrysdale.com	(925) 824-4886	588 San Ramon Valley Blvd., Ste. 250	Danville	CA	94526
CA326	Berkshire Hathaway HomeServices	Drysdale Properties	Shawna	Raines	relocation@bhhsdrysdale.com	(925) 202-0003	588 San Ramon Valley Blvd., Ste. 250	Danville	CA	94526
GA301	Berkshire Hathaway HomeServices	Georgia Properties	Janet	Mauldin	janet.mauldin@bhhsgeorgia.com	(770) 992-4100	100 Mansell Court East, Ste. 600	Roswell	GA	30076
GA301	Berkshire Hathaway HomeServices	Georgia Properties	Erin	Young	erin.young@bhhsgeorgia.com	(678) 352-3358	100 Mansell Court East, Ste. 600	Roswell	GA	30076
MI205	Real Living	Great Lakes Real Estate	Kathy	Coon	kcoon@mirealsource.com	(248)293-0000	2915 S Rochester Road	Rochester Hills	MI	48307
	HSF Affiliates	HSF Affiliates	Mary	Kelly	marykelly@hsfranchise.com	(949) 794-4726	18500 Von Karman Ste 400	Irvine	CA	92612
	HSF Affiliates	HSF Affiliates	Sue	Giardino	suegiardino@hsfranchise.com	(949) 794-4728	18500 Von Karman Ste 400	Irvine	CA	92612
MI302	Berkshire Hathaway HomeServices	HWWB, REALTORS	Ann	Burns	aburns@hwwbrealtors.com	(248) 646-6200	880 S. Old Woodward Ave.	Birmingham	MI	48009
IN302	Berkshire Hathaway HomeServices	Indiana Realty	Ann	Gioe	agioe@bhhsin.com	(317) 913-2846	3801 E. 82nd St	Indianapolis	IN	46240
MI203	Real Living	Kee Realty	Lynn	Louton	relocation@keerealty.com	(586)840-0400	15501 Metropolitan Parkway, Ste. 105	Clinton Township	MI	48036
CT301	Berkshire Hathaway HomeServices	New England Properties	Jim	LaBanca	jimlabanca@bhhsne.com	(860) 571-7012	860 N. Main St. Extension	Wallingford	CT	06492
TX310	Berkshire Hathaway HomeServices	PenFed Realty	Molly	Spalding	molly.spalding@penfedrealty.com	(866) 257-1924	3303 Lee Parkway, Ste. 200	Dallas	TX	75219
MO303	Berkshire Hathaway HomeServices	Select Properties	Angie	Braford	relo@bhhsselectstl.com	(314) 910-3414	1650 Des Peres Rd., Ste. 205	St. Louis	MO	63131
PA315	Berkshire Hathaway HomeServices	The Preferred Realty	Tracy	Young	tracyyoung@thepreferedrealty.com	(412) 367-8000	9840 Old Perry Hwy.	Wexford	PA	15090

Section THREE

Keywords and Phrases that Resonate

<i>Trust, Integrity, Stability, Longevity</i>	
<i>Berkshire Hathaway HomeServices – The Forever Agent</i>	
<i>Real Living 360 Service® - Trusted advisor, skilled negotiator, expert facilitator</i>	
<i>The Customer Experience; The Customer Journey</i>	
<i>Advocate</i>	<i>Trusted Advisor</i>
<i>Steward</i>	<i>Partner</i>
<i>Professional Partner</i>	<i>Flexible</i>
<i>Enduring</i>	<i>Focused</i>
<i>Accountable</i>	<i>Innovative</i>
<i>Servant Service</i>	<i>Best-in-Class</i>
<i>Ambassadors</i>	<i>Nimble</i>
<i>Data-driven, but Personalized</i>	<i>Strategic</i>
<i>Goal-driven</i>	<i>Competitive</i>
<i>Consultative</i>	<i>Empathetic</i>
<i>We're "Mavericks" for our clients!</i>	<i>We're with you on your Journey.</i>
<i>I'm your advocate, no matter what the outcome. (Explain what you did to achieve desired outcome.)</i>	
<i>Tell me about your current home and what you love about it.</i>	
<i>What would you change about your current home?</i>	
<i>If you have worked with an agent in the past, what are some of the personality traits, what worked?</i>	
<i>How do you prefer to communicate? How about your spouse/partner – is it different for them?</i>	
<i>What are your goals – with this move, this home?</i>	
<i>What would great service feel like to you.</i>	
<i>Look for context clues – new dog (Sparky), graduation...personal side of life. Add personal touch to notes.</i>	
<i>Reiterate previous discussion.</i>	
<i>Share something personal about yourself – we're human, too! Form a relationship.</i>	

Section FOUR

Sample Communications & Links to Sample Videos

Berkshire Hathaway HomeServices Indiana Realty:

For buyers:

1. We touch base every 30 days asking how things are progressing and if there is any room for improvement. Responses are shared with assigned agent.
2. We send our own post-closing survey asking for feedback and permission to share. This is posed on agent's Facebook and LinkedIn.

Dear Mr. Smith,

As promised, you will soon be hearing from your Relocation Specialist. We wanted to send this quick video introduction (only 2 minutes) to introduce the entire team that will be working for you!

Click on link below (only 2 minutes!)

<http://youtu.be/QdPqo2e408E>

The resume of your Relocation Specialist, Deb Polise, is attached.

Deb will be contacting you shortly to schedule a convenient time to meet and view your home. She needs to take pictures at the time of your meeting (NOT for marketing) and will then return to her office to complete a very detailed report, which will be submitted to your relocation company.

Best wishes,

Ann Gioe

Relocation Director

317-913-2803

Berkshire Hathaway HomeServices Indiana Realty Relocation

www.BHHSINRealty.com

www.IndianaResourceCenter.com

Berkshire Hathaway HomeServices Georgia Properties:



We are delighted to have the opportunity to provide assistance as you consider your move to Metro Atlanta. We focus on you, so you can focus on the many aspects of your move.

Our team has carefully vetted informational resources via the links below covering a broad spectrum of subject matter that will be valuable in familiarizing you with the area and better equipped to make informed decisions. We are happy to research any additional subjects that may be of interest.

Atlanta has been praised as the "best all around place to live in America"...we look forward to showing you why. Our team of associates are specially trained to earn the coveted "Relocation Specialist" designation and achieve eligibility to work with relocating individuals and families.

Please find below, the name and contact information for our relocation specialist who will be available to assist with all your housing needs.

Shelley Moore shelley.moore@bhhsgeorgia.com (404) 862-0288

Of course, I am available as an advocate to support you throughout the process. Feel free to reach out to me at any time.

We strive for "5" star service and welcome your feedback during and after the move.

All the best,

*Janet Mauldin
(678) 352-3346*



BERKSHIRE HATHAWAY
HomeServices
Georgia Properties



Berkshire Hathaway HomeServices Georgia Properties is a leader in real estate covering Metro Atlanta, North Georgia and the Southern Crescent with 26 office locations and 1600+ associates.

Click on the links below to discover a broad spectrum of life in Atlanta including education, cultural and recreational opportunities, transportation, and much more. Have a particular interest?
Give us a call and we'll be happy to research any subject for you!

WELCOME TO ATLANTA

TOP PLACES TO SEE

EDUCATION SOURCE

MARTA TRANSPORT



GEORGIA'S NEW HANDS FREE LAW

GOOD TO KNOW



Prosperity Home Mortgage, LLC: Prosperity Home Mortgage provides a wide range of home financing programs and products that can benefit buyers and sellers. As you consider your next purchase, Prosperity Home Mortgage has several programs that allow you to close faster and reduce risks of rate increases, so you can have peace of mind for your transition. [Click here for more information.](#)



Weissman P.C. works with you to ensure a positive closing experience. A pioneer in closing technology, the firm provides an online portal, ClosingConnect, where buyers and sellers share the information required for closing efficiently and more securely than ever before. Weissman understands that it's not just closing a sale, it's opening the door to a home. [Click here for more information.](#)



HomeServices Insurance: Offers affordable and reliable insurance. We represent some of the top rated national and regional insurance carriers in the country. [Click here for more information.](#)



HSA Home Warranties: Berkshire Hathaway HomeServices Georgia Properties has established a strategic partnership with HSA Home Warranty. Let us help you discover why Buyers should always purchase a home warranty. [Click here for more information.](#)



Hello John & Susan!

The relocation team with Berkshire Hathaway HomeServices Georgia Properties understands that the weeks leading up to your move can be an exciting, yet a stressful time. Therefore, we only select agents who are certified in the relocation process to assist you with your home sale. Our agents are highly trained in a proven sales process developed by our company called the "Advanced Property Marketing System". Our agent will guide you through the steps of staging, pricing and marketing of your property. This system allows us to sell your home quickly and efficiently to give you the highest return on the sale of your property.

Below is the agent selected to assist you with your relocation and they will reach out shortly to schedule the listing appointment.

Your Relocation Agent is Joyce Teitelman.

joyce.teitelman@bhhsgeorgia.com

(770) 335-2489

"A home is one of the most important assets that most people will ever buy. Homes are also where memories are made and you want to work with someone you can trust."

WARREN BUFFETT | CHAIRMAN AND CEO
BERKSHIRE HATHAWAY, INC.

A message from
Chairman/CEO Warren Buffett
CLICK HERE

https://hsga-a.akamaihd.net/mm/flvmedia/233/w/t/0/wt06p3gg_b98518q7_h264_2328K.mp4

One of the many benefits of working with Berkshire Hathaway HomeServices Georgia Properties is that we provide a home warranty during the listing period FREE of charge to you! Ask your agent for details.

Affiliated Business Arrangement Disclosure



HSA Home Warranties: Berkshire Hathaway HomeServices Georgia Properties has established a strategic partnership with HSA Home Warranty. Let us help you discover why Buyers should always purchase a home warranty. [Click here for more information.](#)

Our team is dedicated to ensuring we provide a smooth relocation experience for all. We focus on you...so you can focus on your move!

All the best,
Janet Mauldin
(678) 352-3346

Hi John & Mary,

Congratulations on the accepted offer of your new home! While your transaction is in the closing process, Berkshire Hathaway HomeServices Georgia Properties will continue to ensure that you receive excellent service.

If, during this last segment of your real estate transaction, you experience any difficulty or need assistance please do not hesitate to contact me personally.

We are committed to your total satisfaction.

Thank you!

Your business is greatly appreciated!

Sincerely,

Janet Mauldin

Berkshire Hathaway HomeServices Georgia Properties

(678) 352-3346

Hi David & Carol,

As the closing date approaches for 1212 Happy Home Way, I want to make sure you are pleased with the service Berkshire Hathaway HomeServices Georgia Properties is providing.

If, during this last segment of your real estate transaction, you experience any difficulty or need assistance please do not hesitate to personally contact me.

We at Berkshire Hathaway HomeServices Georgia Properties are committed to your total satisfaction.

Thank you! Your business is greatly appreciated!

Sincerely,

Janet Mauldin

Berkshire Hathaway HomeServices Georgia Properties

(678) 352-3346 Janet.Mauldin@bhhsqa.com

Berkshire Hathaway HomeServices Carolinas Real Estate

From Cecily Durrett FYI – I thought I'd pull out the specific video I mentioned ...this is my Biz Dev Director (Shannon Wilson) in the middle of the state, and the video is customized for the direct corporate client, which is a medical center.

<https://vimeo.com/304180463/88a53348e0>

As Director of Relocation for Berkshire Hathaway HomeServices Carolinas Real Estate, it is my privilege to connect with you and your family as you consider a possible relocation. Below are some links to a welcome video and a great piece on North Carolina and Winston Salem. I have also attached our relocation flyer so you can see the breadth of relocation services provided. We hold our partnership with WFUBMC to the highest standard. To that end, the level of support we provide to all relocations, new hires and candidates is unparalleled and our true pleasure.

There is a wonderful life here in Winston-Salem and we are happy to be your docents to our great city.

<https://youtu.be/ZES0lfr0wc>

<https://vimeo.com/304180463/88a53348e0>

<https://youtu.be/yqK5xSU5kHo>

http://www.wsbusinessinc.com.php72-35.phx1-1.websitetestlink.com/wp-content/uploads/2018/12/2018_WSBI_Demographics_Digital_12_5_18.pdf

I was so happy to connect with you. We would all be so excited about a possible relocation to NC. I can be a tremendous resource if you relocate here. I will be looking forward to meeting you and best of luck with your interviews.

Thanks,

Shannon Wilson

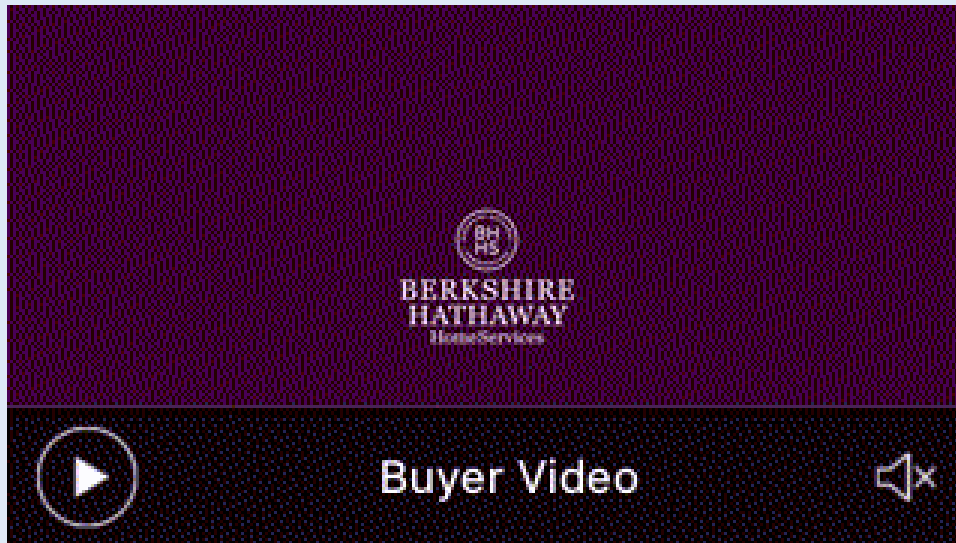
Berkshire Hathaway HomeServices Carolinas Real Estate

Berkshire Hathaway HomeServices Alliance Real Estate, Chesterfield, MO

Michelle Bennett

<https://dashboard.videolicious.com/watch/RI3XCy9gYRUg>

(paste this link into Chrome browser; use branded image like below vs a plain link, so recipient will know it came from a legitimate source)



Buyer video script

Hi, I am Michelle Bennett, the relocation manager for Berkshire Hathaway HomeServices Alliance Real Estate. It was a pleasure speaking with you today and we are very excited about your move to our wonderful city!

Information on the agent selection I have assigned to you is attached to this email with the video. I've chosen your agent based on your home search area, and other pertinent information you have provided. This agent will be available to welcome you, answer your questions regarding your move and provide you with great information about the St. Louis area.

Our company takes pride in being a champion for our city. Whether it is our unique neighborhoods, top-rated educational systems, an abundance of children's activities, theatre, museums and sporting events, St. Louis has it all!

Please don't hesitate to give me a call or send an email. Making sure you have a positive experience is most important to us here at Berkshire Hathaway HomeServices Alliance Real Estate. All my contact information is included in this email. Good luck and I hope you find the perfect home! Thanks!



**BERKSHIRE
HATHAWAY**
HomeServices
Alliance Real Estate

July 10, 2019

Hello Cindy and James,

I hope this email finds you well! My purpose in reaching out is to make sure you are happy with the service that Jane Doe has provided thus far. Your complete satisfaction is my primary concern.

The homebuying experience can be stressful, especially when relocating from another city/state. Jane is there to ensure the entire process runs as smoothly as possible. Our hope is that your experience will want you to recommend Berkshire Hathaway HomeServices Alliance Real Estate to your friends, family and colleagues.

Very soon you should be receiving a survey from BGRS asking about our service. We want to be sure that you are very satisfied in all the areas mentioned below:

- Showed you properties appropriate to your housing needs
- Assisted with negotiating the purchase of your new home
- Kept you informed regarding the purchase of your home
- Effectively resolved problems and issues

We strive to make sure every client is completely satisfied with our agents and services. When you have a moment, please let me know how things are going by giving me a call or sending a quick email.

Thank you for your time, and I look forward to hearing from you soon.

Warm regards,

Michelle Bennett
Vice President-Corporate Relocation Services
Berkshire Hathaway HomeServices Alliance Real Estate
636-733-5010
mbennett@bhhsall.com
www.bhhsall.com



**BERKSHIRE
HATHAWAY**
HomeServices
Alliance Real Estate

July 10, 2019

Hello Cindy and James,

Congratulations on the purchase of your new home! While your transaction is in the inspection and closing process, Berkshire Hathaway HomeServices Alliance Real Estate and Jane Doe will continue to ensure that you receive excellent representation. If during this last segment of your real estate transaction you experience any difficulty or need additional assistance, please do not hesitate to contact me personally.

At Berkshire Hathaway HomeServices Alliance Real Estate, we are committed to your total satisfaction.

Warm regards,

Michelle Bennett
Vice President-Corporate Relocation Services
Berkshire Hathaway HomeServices Alliance Real Estate
636-733-5010
mbennett@bhhsall.com
www.bhhsall.com

Berkshire Hathaway HomeServices Drysdale Properties, San Francisco Bay Area

Jill Wylie/Shawna Raines

1st email to client upon placement

Hi Cindy & James,

Berkshire Hathaway HomeServices Drysdale Properties is proud to represent your real estate needs in our area. We have made a company commitment to uphold the standards of delivering high quality products and extraordinary service.

Our real estate agent, Travis Conte, has been specifically selected for you based upon proven performance and a dedication to providing excellent customer service. We consider it a privilege to have the opportunity to work with you.

Travis Conte
(650) 520-5753
travisconte@gmail.com

As you work with our agent, if you have questions or concerns please do not hesitate to contact me. In closing, service is our team's first priority! It is our goal to ensure that your experience is excellent and to earn your highest rating!

2nd email to client – 14 days after assignment

Hi Cindy & James,

I hope this e-mail finds you well! I just wanted to check in with you to make sure that you have been contacted by Travis Conte, and that you are happy with the services provided so far. Your complete satisfaction with our service is my primary concern.

The home-buying experience can be stressful and overwhelming at times, and Travis is there to ensure the entire process runs as smoothly as possible. We look forward to making sure your experience is one you want to talk highly about.

My contact information is below. Feel free to contact me via e-mail or at the number provided should you have any questions or need anything throughout your home-buying process. We strive to make sure every client is satisfied with our people and services. Please let me know how things are going when you get a chance.

Thanks for your time, and I look forward to hearing from you soon!

3rd email to client – 35 days after assignment

Hi Cindy & James,

I am just checking in with you to see how your home search is coming along. I want to make sure that you happy with the services that Travis Conte has provided so far.

You should be receiving a survey from Berkshire Hathaway HomeServices Drysdale Properties after your move is complete. We want to be sure that you are **very satisfied** in all the areas mentioned below:

Please rate the real estate company in the following areas:

- . Showed you properties appropriate to your housing needs.
- . Assistance with negotiating the purchase of your new home.
- . Kept you informed and effectively resolved problems and issues.

If for any reason you are not **very satisfied** throughout the home purchase process, then please reach out to me. I have provided my contact information below. Feel Free to contact me via email or at the number provided below.

Thanks for your time, and I look forward to hearing from you soon!

4th Email to client – when buyer goes pending

Hi Cindy & James,

Congratulations on the purchase of your new home! While your transaction is in the closing process, Berkshire Hathaway HomeServices Drysdale Properties and Travis Conte will continue to ensure that you receive excellent service.

If, during this last segment of your real estate transaction, you experience any difficulty or need assistance, please do not hesitate to contact me personally.

We, at Berkshire Hathaway HomeServices Drysdale Properties are committed to your total satisfaction.

Email sent to client when we get the listing

We are honored that you have trusted Berkshire Hathaway HomeServices Drysdale Properties with the sale of your home. We want to ensure that you are very satisfied with the services provided by our agent, Travis Conte.

In an effort to provide a smooth and seamless transaction, please let us know your preferred method of communication (text, email, phone call) and frequency. Of course, Travis will always keep you apprised of any updates or actions that are taking place, but we want to be sure they are communicating with you on a regular basis as well.

We truly appreciate your partnership and look forward to a smooth and successful closing!

Section FIVE

Video Tips, Tricks and Best Practices:

Ann Gioe, Relocation Director, Berkshire Hathaway HomeServices Indiana Realty

Click on link below (only 2 minutes!)

<http://youtu.be/QdPqo2e408E>

- ✓ *We used a local, small studio that had a green screen to capture local landmarks without having to film “on location”.*
- ✓ *Keeping it short is VITAL - I know that I skip right past videos that are 5+ minutes long.*
- ✓ *Ours is a little over 2 minutes and our next one will be shorter.*
- ✓ *If your speaker/s and content are not engaging, then you might have to use something visual - like we did to enhance the appeal.*
- ✓ *We found it best to keep the content fairly general so you can use it for a vast audience as a cost savings.*
- ✓ *We had done our own videos previously but having a green screen studio, professional lighting, sound and teleprompter gave it a much more polished look.*

Cecily Durrett, CRP®, Director, Relocation & Business Development, Berkshire Hathaway HomeServices Carolinas Real Estate:

Here’s a link to a video we just released on YouTube about one of our markets. Our Marketing team is partnering with Our State Magazine to produce one for each of our three major markets in NC. <https://www.youtube.com/watch?v=9WWZ57hEJDq&feature=youtu.be>

Here are a few tips on producing videos:

- Check out the resources already available to you through your company or brand, such as Videolicious.
- Don’t let perfection be your enemy! Audiences are very forgiving because of so much social media usage
- Be yourself – the camera reads us very authentically, so relax and let your unique personality shine through
- Be aware of what’s in your shot – check for what the camera sees around you before you start. Remove busy distractions, such as bulletin boards, plants that may be behind you, etc.
- Wear solid colors – no busy patterns. The camera lens will jump around with complicated patterns in scarves, etc. – you want viewers to focus on YOU and your message.
- Ladies – keep makeup simple – no shiny eyeshadow or too much blush, etc.

- Guys - check your forehead in the camera before you shoot – you may need to powder your face to reduce glare. Keep jewelry simple; keep focus on you.
- Make sure the lighting is warm – overhead florescent lighting is NEVER flattering so fill in with warmer lamps if you can.
- Put some movement into your shots. Standing still is fine, but don't do it for too long. Get comfortable walking toward the camera as if you're having a conversation with someone - you'll hold their attention longer and it will help you relax.
See sample here: <https://vimeo.com/353664870/4970898e72>
- Don't be afraid to use video of your market if you're describing community assets – video is a visual medium!
- Keep it short – our attention spans are so limited...you can always “tease” another topic and promise to follow up with another video on specific information to thread things through and keep their interest.
- Find a partner and let the viewer in on a conversation as a technique to get information across as opposed to feeling obligated to jam it all in by yourself. (Use an agent who asks you questions; pull someone from your department...or even a former transferee if they're willing to talk about what their experience was like).
- Pretend the camera is someone you care about – your grandmother; your best friend, etc. It will add warmth to your eyes and delivery automatically.
- Try to keep video to a minute.
- Have fun!! You LOVE your job and the service you deliver every day. Let it show.

Michelle Bennett, VP Corporate Relocation Services, Berkshire Hathaway HomeServices Alliance Real Estate:

I personally like to use the videolicious.com app. I have done two successful videos using this app.

1. First, I write my own script. Writing it myself allow me to present the material in a relaxed state. Love selling your city/market.
2. We typed the script into the videolicious program, so it was displayed on the laptop screen. I can read it and it looks like I am talking to someone. The laptop has a camera which enabled us to film the video anywhere.
3. I do a practice run through to make sure I am going at the right pace, look relaxed, know what I am saying, not just reading it!
4. Have a setting that looks like a real office, minimal background noise.

Section SIX

BGRS Customer Satisfaction Commitment – July 2019

This is what BGRS is providing to their relocating customers; make certain this is incorporated into the agent's communication as well as your own.

Commitment to BGRS and Customer Satisfaction

As a member of the BGRS Network, and as providers of critical Homesale and Homefinding services, our brokerage is fully committed to meeting BGRS' Customer Satisfaction program goal of 95% customer satisfaction. This is a goal that mirrors those set by clients, and cascades to all BGRS employees as well as to brokers and suppliers.

You will be provided an opportunity at the completion of your move, to complete an online Customer Satisfaction Survey from BGRS, and will be asked to rate your real estate customer service experience on a six-point scale with six representing Completely Satisfied with the service provided, and one representing Completely Dissatisfied.

Throughout the transaction, the relocation director and agent will be checking in with you at key intervals to confirm that they are meeting or exceeding your expectations. If at any time you have a concern about the service being delivered, please don't hesitate to reach out to your real estate agent, their relocation director, or to your contact at BGRS, so that any necessary adjustments may be made.

Our shared objective is to provide you with the highest levels of Customer Satisfaction, from beginning to end, so that you will rate your experience in the real estate broker category as Completely Satisfied.

Below are the survey questions you will be asked about your experience with our preferred broker network member. Thank you in advance for taking the time to complete this important feedback survey.

Homefinding / Destination Services

Please rate your level of satisfaction with the real estate company, (Brokerage Name), in finding your new home in the following areas:

- Showed you properties appropriate to your housing needs
- Assisted with negotiating the purchase of your new home
- Kept you informed regarding the purchase of your home
- Effectively resolved problems and issues
- Overall satisfaction with the real estate company

Marketing Assistance

Please rate your level of satisfaction with the real estate company, (Brokerage Name), with regard to the sale of your home in the following areas:

- Knowledge of local real estate market
- Assisted with negotiating the sale of your home
- Kept you informed regarding the sale of your home
- Effectively resolved problems and issues
- Overall satisfaction with the real estate company

Section SEVEN

Real Living 360 Service® Guarantee courtesy

Real Living Great Lakes Real Estate, Kathy Coon



THIS GUARANTEE IS MY COMMITMENT TO YOU



AS YOUR TRUSTED ADVISOR I WILL:

- Conduct counseling and information sessions to identify your needs and goals and to plan a property search.
- Make myself available to you on a priority basis in order to meet your needs and schedule for property research and showings.
- Complete a comprehensive market search to identify properties consistent with your needs and price range.

AS YOUR SKILLED NEGOTIATOR I WILL:

- If requested, provide data on recently sold properties within the areas of your home selection.
- Offer to provide property description and seller's statement of property condition as available, prior to the offer to purchase.
- Prepare a written Offer to Purchase on the property of your choice reflecting your price and terms.
- Present all offers to purchase in a timely fashion using standardized forms.
- Assist you in monitoring the status and satisfaction of contract contingencies.

AS YOUR EXPERT FACILITATOR I WILL:

- Offer to arrange a pre-qualifying or pre-approval meeting with a lender to determine your price range.
- Offer access to community and property information.
- Provide assistance in accessing information on licensed building inspectors prior to the Offer to Purchase.
- Accompany you on a property inspection prior to closing, if provided for in the contract.
- Contact you after the closing to assure the satisfactory completion of all service details.
- Offer the opportunity to evaluate the service provided, after the transaction, through a Customer Satisfaction Survey. This survey is administered by Leading Research Corporation, an independent, third-party research company.

REAL LIVING 360 SERVICESM GUARANTEE FOR THE HOME BUYER CUSTOMER



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MY
SERVICE COMMITMENT
TO YOU



I give you my personal commitment to provide you with quality, customized service that meets your needs.



I promise to keep in touch with you, and deliver the level of service you want.



I pledge to give you access to special programs and services that can deliver value and relieve the stress of buying or selling a home.



You may contact me at any time for additional information or with questions or concerns.



I commit to you that I will always endeavor to deliver the caring service that you deserve.

Agent Signature

Customer Signature

Section EIGHT

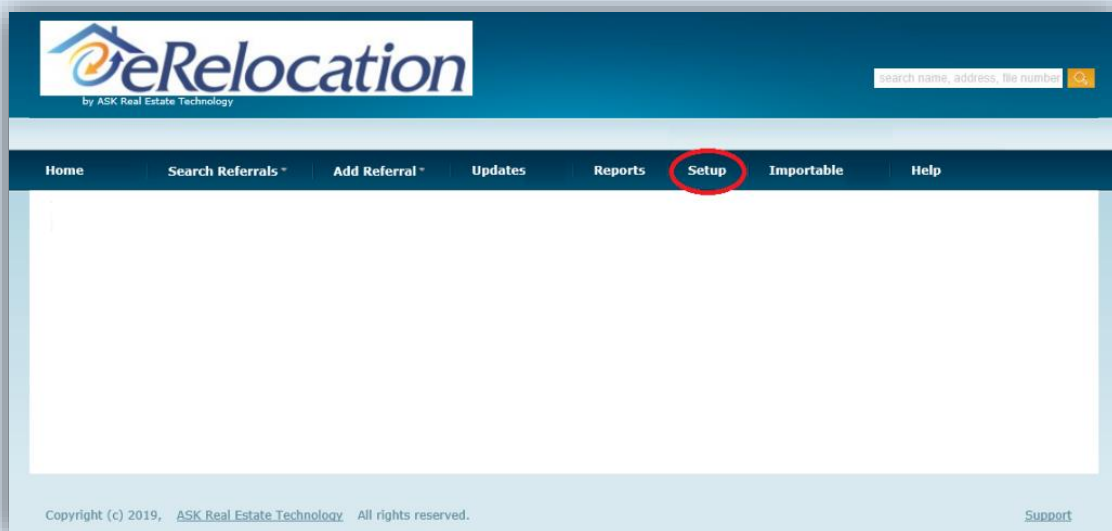
Action Plans/Auto Pilots, Form Letters - eRelocation & ReloSpec

eRelocation Primer (5 pages), courtesy of Shawna Raines
Berkshire Hathaway HomeServices Drysdale Properties

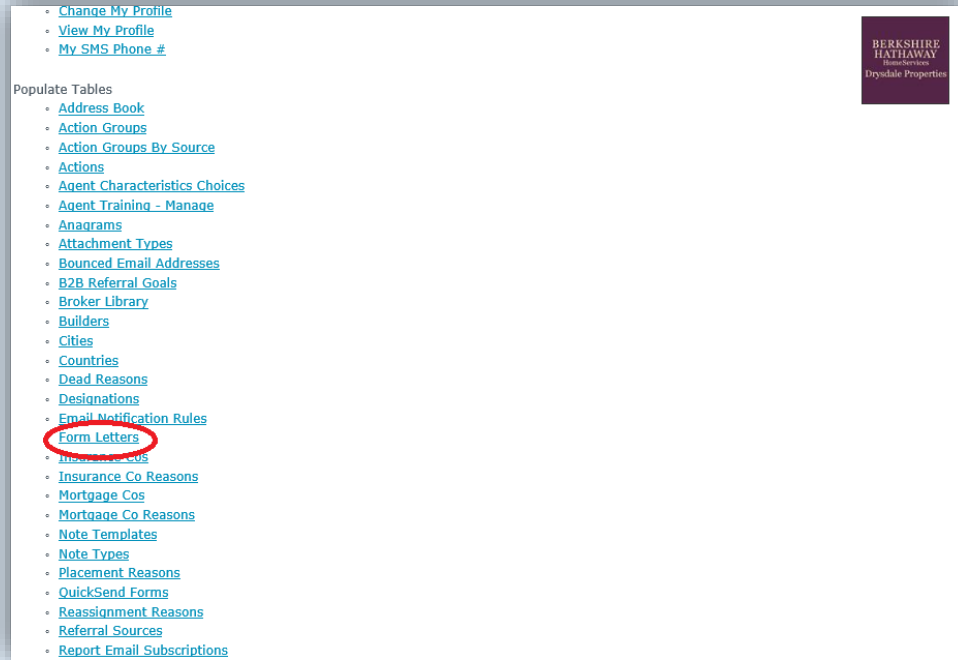
How to Setup Form Letters & Email Notification Rules

An Email Notification Rule enables a user to automatically send a form letter (available in the forms library) based upon a status change or triggering event. An email notification rule eliminates the extra step of manually sending the letter (from the referral) which ultimately saves time. *Once the form is sent, the entire transmission can be viewed in the “Read Notes” section of the referral.

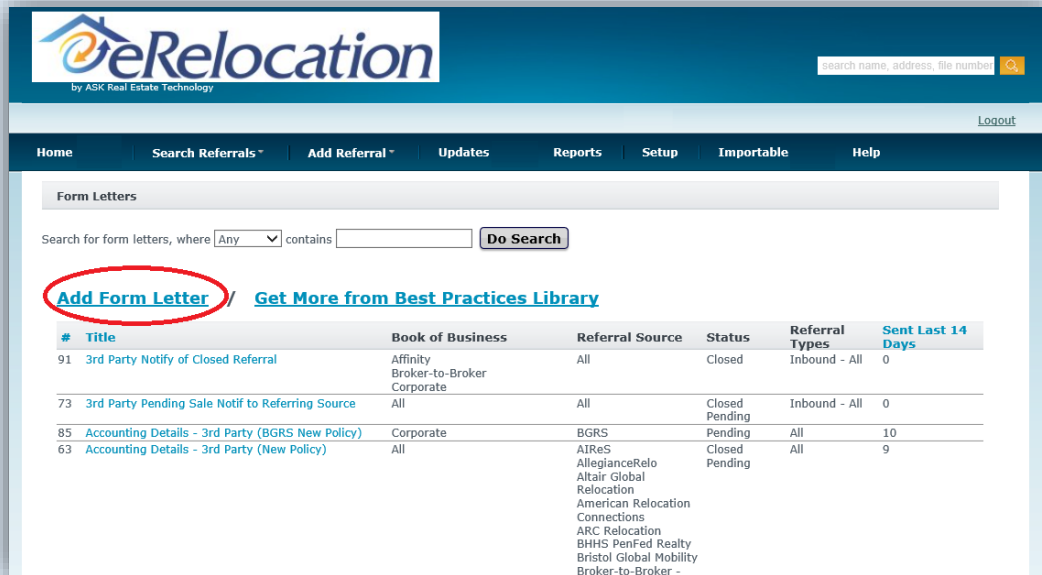
- 1.) Click “Setup” on the main blue toolbar



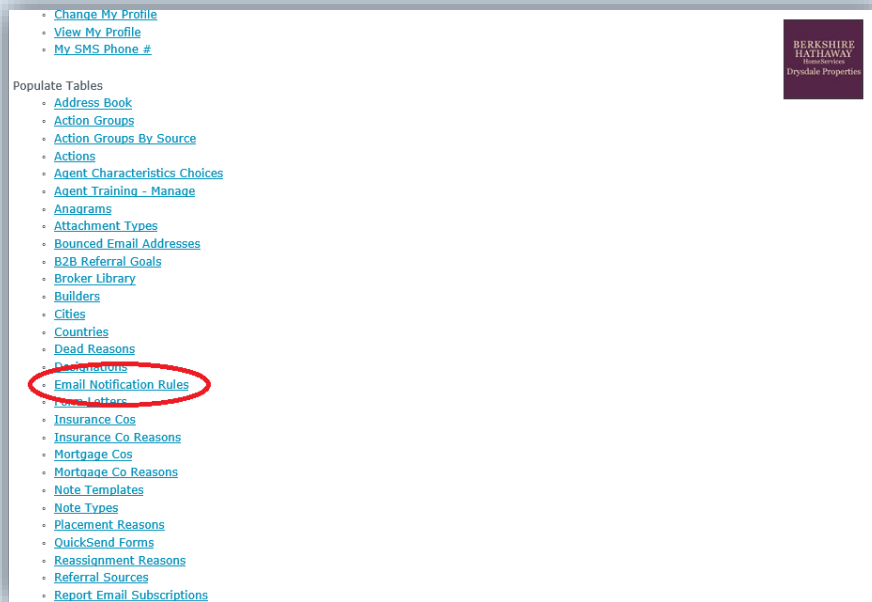
2.) Click "Form Letters"



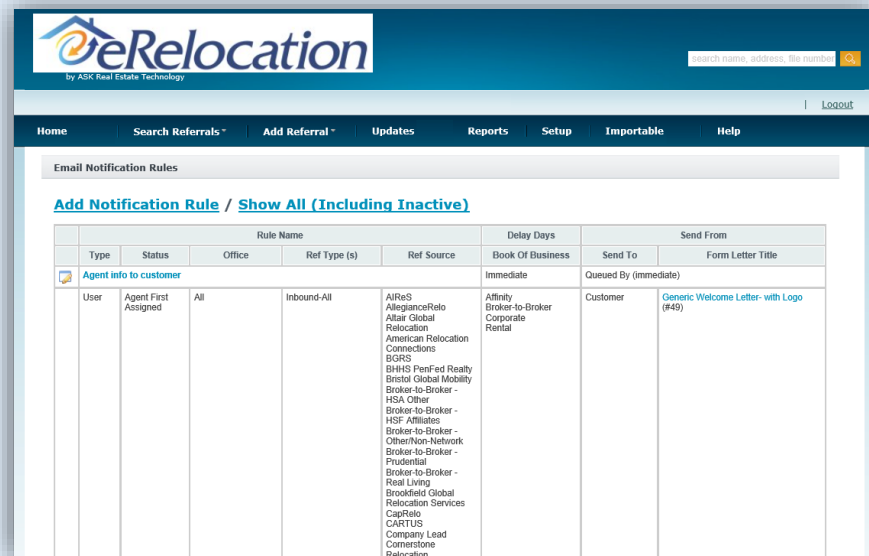
3.) Click "Add Form Letter" – This is where you will add your letter that you want to email out. After adding your letter click save and go back to the Setup Menu.



4.) Click “Email Notification Rules”

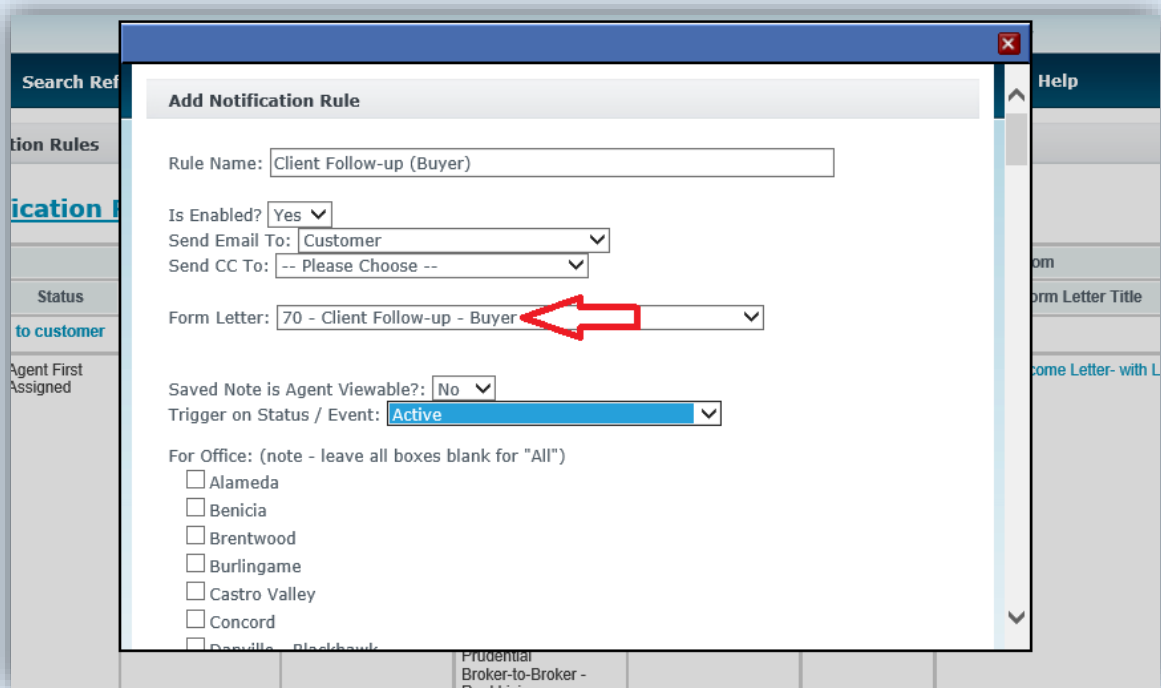


5.) Click “Add Notification Rule”



- Rule Name – the name of the new rule (i.e., Generic Welcome Letter)
- Is Enabled – Yes

- c. Send Email To – Select the primary recipient of the email (i.e., Customer, Our Primary Agent Only, Etc.)
- d. Send CC to – Select a secondary recipient of the email (i.e., Manager)
- e. Form Letter – Select the form letter to be sent



- f. Saved Note is Agent Viewable – Yes / No – if yes, the agent can view the letter content in the “Read Notes” section of the referral (via their eRelocation agent dashboard).
- g. Status Change or Triggering Event – This determined when the letter is to be sent to the recipient.
- h. For Office – Select a particular office(s) that applies to the email send. For all offices leave blank.
- i. Book of Business – Select which book of business the letter applies to (i.e., Affinity, Broker to Broker).
- j. Referral Source – Select which referral source(s) this applies. Leave blank if all referral sources should be included. *Note: if a user wants a letter to go out on all sources found under a particular Book of Business, it is not necessary to define/select sources.
- k. Referral Type – Select applicable referral type (i.e., Inbound HS, Inbound HF, Inbound All, or Outbound HS, Outbound HF, Outbound All)
- l. Queue for Later Delivery
 - i. No – Letter will send immediately upon the status change or triggering event

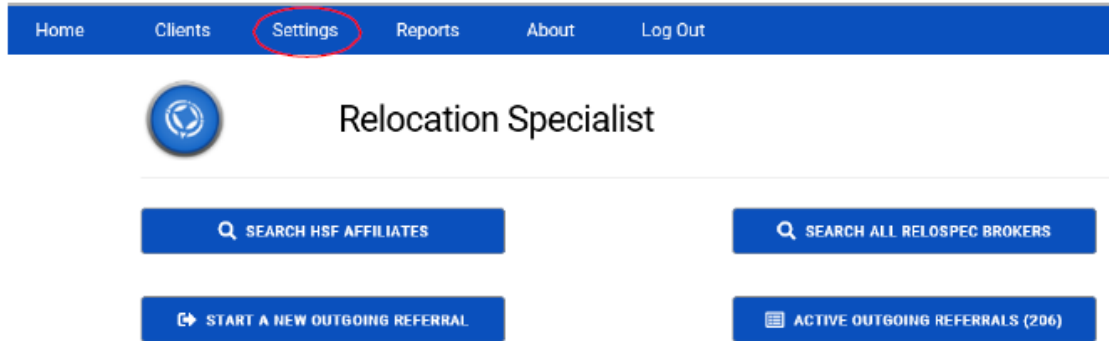
- ii. Yes – allows you to delay the letter by X # of days after a status change or triggering event. If set on a delay, answer the following questions:
 - a. Send Email From: Select from the drop down who the email letter should be sent from (i.e., Entered By, Placed By, etc.)
 - b. Don't Send Before Hour (Eastern): If sending to a customer, use 11 am so letters are sent to go out no earlier than 7 am in all US time zones.
 - c. Que for # of Days: Enter # of day(s) the letter should be delayed from the status change or triggering event (i.e., 1 = 1 day, 2+ 2 days, etc.).
 - d. As long as the status is still: Select the status that this rule should persist on. If multiple statuses are necessary, hold the CTRL key and click on each status. Persisting on multiple statuses is not typical.

The screenshot shows a configuration window for an email rule. The window is titled "35 days" and "Entered By". It contains various dropdown menus and checkboxes for configuring the email rule, such as "Info Only", "Registered Customer", "Flip", "REO", "BMA Only", "Inventory", "Is Parent Referral", "Resend if Prev Sent?", "Allow send if agent is Placeholder?", "Allow send if agent is referral owner?", "Queue for later delivery?", "Send Email From", "Don't Send Before Hour (Eastern)", and "Queue for # of days". A status dropdown menu is open, showing options like "Active", "Closed", "Dead - Counts", "Dead - Don't Count", "Listed", "Mistake", "On-Hold", "Pending", and "Received - Not Placed". A "Submit" button is visible at the bottom left of the configuration window.

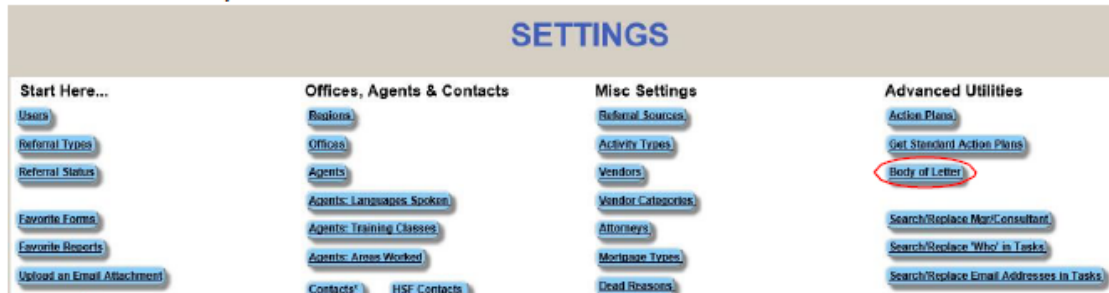
ReloSpec (Constellation Web Solutions) Primer – (5 pages), courtesy of Tracy Young
Berkshire Hathaway HomeServices The Preferred Realty and Northwood Realty Services
Creating an autopilot specific to BGRS Surveys

1. You should first create a Body of Letter that represents the body of the email that you would like to send:

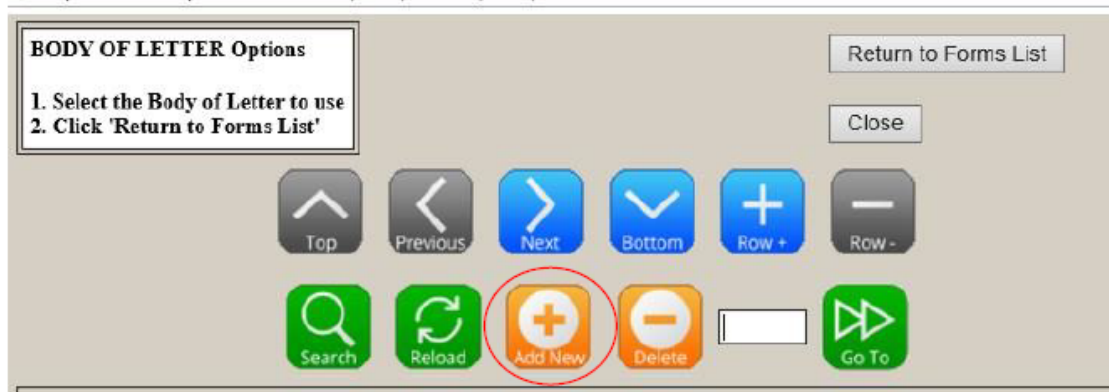
a. Go to Settings




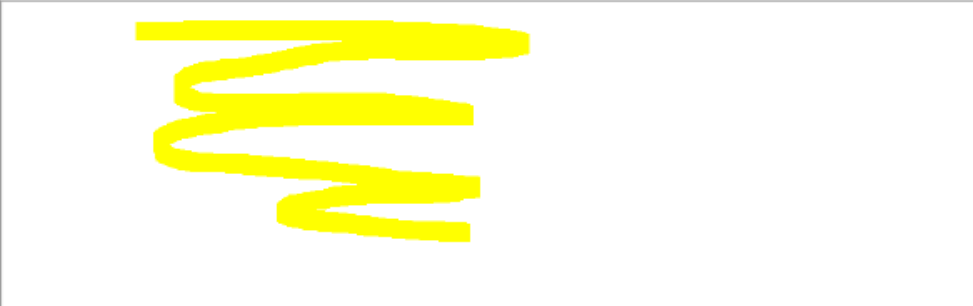

b. Select Body of Letter



c. Add New



- d. Name the Body of Letter in the Description Field and complete the text you would like to be sent in the email to the agent then Add New Record. I have mine named as BGRS Premier Service Survey and I have attached a copy of the email that is delivered to my agents for review.

Add a new record	
Field	New Record
Description	
Text	
	<input type="button" value="Add New Record"/> <input type="button" value="Reset"/>

- 2. Next we have to upload a copy of the BGRS Premier Survey that you would like delivered to the agents:
 - a. Back in Settings, go to Upload an Email Attachment

SETTINGS

Start Here... Users Referral Types Referral Status Favorite Forms Favorite Reports Upload an Email Attachment	Offices, Agents & Contacts Regions Offices Agents Agents: Languages Spoken Agents: Training Classes Agents: Areas Worked Contacts HSF Contacts	Misc Settings Referral Sources Activity Types Vendors Vendor Categories Attorneys Mortgage Types Lead Reasons	Advanced Utilities Action Plans Get Standard Action Plans Body of Letter Search/Replace Mar/Consultant Search/Replace 'Who' in Tasks Search/Replace Email Addresses in Tasks
--	--	---	---

b. From this screen, just browse for the BGRS survey file and hit Upload File

File Upload Utility

Please select a file from your system to be uploaded onto the ReloSpec Server.

PLEASE, use the "Browse" button to select your file . . .

Last step is creating an autopilot. You can either simply add the autopilot to a pre-existing Action Plan that you already have created (probably the easiest if you have Action Plans built specific to BGRS referrals) or create a separate Action Plan.

a. Back in settings, select Action Plans which will populate the list of Action Plans you already have created in your database

SETTINGS

Start Here...	Offices, Agents & Contacts	Misc Settings	Advanced Utilities
Users	Regions	Referral Sources	Action Plans
Referral Types	Offices	Agents Types	Get Standard Action Plans
Referral Status	Agents	Vendors	Body of Letter
Favorite Forms	Agents: Languages Spoken	Vendor Categories	Search/Replace Mar/Consultant
Favorite Reports	Agents: Training Classes	Attorneys	Search/Replace "Who" in Tasks
Upload an Email Attachment	Agents: Areas Worked	Mortgage Types	Search/Replace Email Addresses in Tasks
	Contacts HSF Contacts	Dead Reasons	

- b. Select the Action Plan you would like to revise and hit the Edit the Action Plan Items button

Action Plans

#	Description
1	*Pending BUYER
2	*Pending SELLER
3	AutoAccept
4	AutoAssign
5	In Buy / Corporate
6	In Buy / Corporate AIRES
7	In Buy / Corporate ALTAIR
8	In Buy / Corporate BROOKFIELD
9	In Buy / Corporate CAPRELO
10	In Buy / Corporate GRAEBEL

[1 - 10 : 50]

Edit the Action Plan Items
 Return to the To Do List

- c. Select Add New

Action Plan Items for:
In Buy / Corporate BROOKFIELD

Return to Action Plans

#	Activity	Schedule # of days from today? (0 = today)	Who	Description	Repeat this item?	Repeats in how many days? (Must be 1 or higher)	Expires in how many days? (optional)	Is a Response Required?	Send how?	Send to whom?	CC	BCC	Send which form?	Email Attachment	End of LT
1	AutoPilot	14	Myself	Brookfield Client Update		1			Email	Client			Custom letter to Client		1004
2	AutoPilot	0	Myself	Referral Confirmation		1			Email	Assigned Agt	Office Mgr	Insurance Contact	Incoming Information Sheet-B		1011
3	AutoPilot	14	Myself	Update Request	✓	30			Email	Assigned Agt			AutoUpdate		
4	AutoPilot	10	Myself	Agent Assignment		1			Email	Client			Client Notification of Agent		

- d. Set up the parameters of how you want this email to be generated and hit Add New Record

LD

Add a new record

Field	Now Record
Activity	AutoPilot
Schedule # of days from today? (0 = today)	14
Who	Tracy
Description	BGRS Survey
Repeat this item?	No
Repeats in how many days? (Must be 1 or higher)	1
Expires in how many days? (optional)	
Is a Response Required?	No
Is this a Specific Response?	No
Send how?	Email
Send to whom?	Assigned Agt
CC	
BCC	
Email From	Myself
Email Subject	BGRS Premier Service Survey Information
Email Subject Variable	Client Name
Send which form? (Favs only)	Custom letter to Assigned Agent
Email Attachment(s)	BGRS Premier Service Survey Questions.pdf;
Body of Ltr	BGRS Premier Service Survey
CheckListItemID	1012
	Add New Record

Section NINE

200 Process Steps – Teamwork Makes the Dreamwork – (7 pages)

Angie Bradford, Berkshire Hathaway HomeServices Select Properties

“TEAMWORK MAKES THE DREAMWORK”

Listed here are nearly 200 typical actions, research steps, procedures, processes and review stages in all of my successful residential real estate transactions that are all provided by FULL SERVICE real estate services in return for my sales commission. Depending on the transaction, some may take minutes, hours, or even days to complete, while some may not be needed.

Most importantly, they reflect the level of skill, knowledge and attention to detail required in today’s real estate transactions, understanding the importance of having help and guidance from someone who fully understands the process – a REALTOR®!

And never forget that REALTORS® are pledged to uphold the stringent, enforceable tenets of the REALTOR® Code of Ethics in their professional dealings with the public. Not every real estate licensee holds a REALTOR® membership. Make sure yours does!

Pre-Listing Activities

1. Make appointment with seller for listing presentation
2. Send seller e-mail confirmation of listing appointment and/or call to confirm.
3. Review appointment questions
4. Research CMA current active properties surrounding home
5. Research Sales activity for past 6-12 months from MLS for surrounding home
6. Research Average Days on Market for surrounding home
7. Prepare CMA for subdivision, ½ mile to one mile for surrounding home
8. Print color copies of comparables to review
9. Review agent remarks on comparables – highlight upgrades, similar items to seller’s home
10. Locate subdivision restrictions – of copies are available in office
11. Print Tax Report from MLS
12. Research property’s ownership
13. Research property’s lot size, dimensions, etc.
14. Research property’s current use and zoning, if any
15. Verify legal names of owner(s)

16. Prepare listing presentation folder with
 - a. CMA Materials
 - b. Tool Kit – personalize to include all property information
 - c. Home Warranty Information
 - d. Home Magazine
 - e. Calendar
 - f. Missouri Broker Disclosure Form
17. Compile and assemble form file on property
18. Review listing appointment checklist to ensure all steps and actions have been completed

Listing Appointment Presentation

19. Review home features with seller
20. Give seller overview of current market conditions – Berkshire Hathaway HomeServices “stats”
21. Present CMA results to seller, including comparables, sold and current listings
22. Offer pricing strategy based on professional judgement and interpretation of current market conditions
23. Present agent’s and company’s profiles
24. Explain market power and benefits of using Berkshire Hathaway HomeServices
25. Explain web marketing
26. Explain the “behind the scenes” and agents’ availability on weekends, open houses, etc.
27. Explain agent’s role in taking calls to screen for qualified buyers and protect the seller from curiosity seekers
28. Explain different agency relationships
29. Review and explain Listing Agreement and additional documents and obtain seller’s signature

Once Property is Under Listing Agreement

30. Measure overall rooms
31. Confirm lot size via owner’s copy of certified survey, if available
32. Obtain house plans, if available
33. Obtain utility bill, if available
34. Obtain subdivision restrictions, if available
35. Verify homeowner’s association fees
36. Identify homeowner’s association name, number and address, if available
37. Order copy of subdivision restrictions, if not provided

38. Verify security system, current term of service and whether owned or leased
39. Verify if there are any transferrable warranties (pest)
40. Verify sewer/septic tank system, last service documentation
41. Compile list of repairs and maintenance items, documentation if available
42. Explain benefits of Home Warranty to seller
43. Assist seller with completion of seller's disclosure
44. Obtain extra key for Supra box
45. Verify if property has rental units involved – if so:
 - a. Make copies of all leases
 - b. Verify rents and deposits
 - c. Inform tenants of listing and discuss how showings will be handled
46. Arrange of installation of Supra box, yard sign and marketing materials
47. Provide suggestions to improve salability inside the home - Décor assessment
48. Provide suggestions to improve salability outside the home - curb appeal
49. Prepare Agent Remarks for MLS
50. Prepare Directions
51. Complete Profile listing sheet with ALL home information
52. Confirm all listing documents are signed and dated
53. Have broker sign off on listing documents
54. Email admin Agent Remarks/Directions
55. Make complete copy of listing package for seller
56. E-mail and confirm Home Warranty, if seller chooses to provide
57. Make copies of Lead Based Paint Disclosure
58. Make copies of Sellers Disclosure
59. Make copies of additional info seller provided (survey, termite, etc.)
60. Make House Binder
61. Make Thank You for Visiting cards
62. Schedule photos shoot and pay invoice
63. Scan Lead Based Paint Disclosure
64. Scan Sellers Disclosure
65. Scan subdivision restrictions

66. Scan additional docs provided by seller
67. Make Sign-In sheet for home

Marketing the Listing

68. Confirm admin has entered listing data to MLS
69. Upload Lead Based Paint Disclosure to MLS and website
70. Upload Sellers Disclosure to MLS and website
71. Upload photos to MLS and website
72. Upload Virtual Tour to MLS and website
73. Review banner on website
74. Create and print photo flyers
75. E-mail seller photo flyer
76. Print MLS for home
77. Coordinate showings with owner, tenants, and other real estate agents
78. Review Showing Desk information
79. Set seller e-mail on Showing Desk
80. Set seller e-mail on website
81. Set seller e-mail on Marketing Resource Center – Seller Advantage
82. Complete House Binder
83. Assign Supra from admin
84. Delivery of Home Binder, Supra, yard sign and arrows to home
85. Email New listing to all agents in the office
86. Post New listing to Facebook, Linked-in and all outer sites
87. Set up Agent E-tour in office meeting
88. Order “Just Listed” card
89. Create and upload information to Postlets
90. Provide “Special Feature” cards for marketing, if applicable
91. Provide “Home Warranty” information, if applicable
92. Mail out “Just Listed” cards notice to 50 neighborhood residents
93. Price changes conveyed promptly to all internet groups
94. Reprint/supply flyers promptly, as needed
95. Feedback e-mails sent to buyer’s agent after showings

96. Review feedback with seller, if needed to determine if changes will accelerate the sale
97. Schedule open houses
98. Set advertising online with open houses
99. E-mail all agents open houses
100. Upload open house to Facebook
101. Set open signs / arrows, when needed
102. Discuss at weekly meetings listing still available
103. Review E-tour comments with seller
104. Review comparables on a regular basis to determine if a price change is needed
105. Review comparables with seller throughout and when needed
106. E-mail website and Berkshire Hathaway HomeServices seller reports (weekly)
107. Review reports with seller, if needed
108. E-mail seller feedback reports from buyer's agents after showings have taken place
109. Receive calls/inquiries about the listing
110. Promptly return phone calls

The Offer and Contract

111. Receive and review all offer to purchase contracts submitted by buyers or buyer's agents
112. Evaluate offer(s)
113. Confirm buyer has provided proof of financing or proof of funds
114. Obtain pre-qualified letter from buyer's lender
115. Review offer and options with seller
116. Prepare and convey any counteroffers, acceptance or amendments to buyer's agent
117. Negotiate all offers on seller's behalf
118. When purchase contract is accepted and signed by seller, deliver copies to buyer's agent
119. Prepare copy package for seller
120. Prepare closing packet for Home office
121. Prepare closing packet for title company
122. Scan or hand deliver closing packet to title company
123. Prepare "Seller Letter" closing procedures for seller
124. Deliver copies and "Seller Letter" to seller
125. Change MLS to "Active under Contract" status

126. Change website to "Active under Contract" status
127. Confirm inspections have been ordered, building, gas, termite, etc.
128. Confirm when all inspections are due
129. Contact buyer's agent/ lender weekly to ensure processing is on track
130. Relay any information to keep seller up to date during the inspection times
131. Review inspections reports once completed
132. Forward copies of inspections reports and inspection
133. Discuss a resolution/response to inspection notice with seller
134. Return response from seller on the inspection notice to buyer's agent
135. Assist or recommend trustworthy contractors to perform any required repairs, if needed
136. Confirm all repairs are completed with licensed contractor, copy receipts for buyer
137. Confirm appraisal has been ordered
138. Schedule appraisal with seller
139. Follow up on appraisal...No News is Good News
140. Assist seller in questioning appraisal report if it comes in low
141. Confirm title work has been completed
142. Obtain a copy of the title commitment, if necessary

Closing Preparations and Duties

143. Coordinate closing process with buyer's agent
144. Schedule closing time for seller
145. Inform seller of closing time and location
146. Inform seller of the title company name, address and contact number
147. Ensure all parties have all forms and information need to close the sale
148. Update MLS once loan commitment and all contingencies are met
149. Assist in solving any title problems
150. Work with buyer's agent in scheduling buyer's Final Walk-Thru prior to closing
151. Inform seller of buyer's Final Walk-Thru
152. Request final closing figures from title agent or attorney
153. Receive and carefully review final closing figures to ensure accuracy of preparation
154. Forward final closing figures to seller to review
155. Assist seller in understanding charges on final settlement statement

156. Provide Home Warranty invoice to buyer's agent and title agent
157. Provide any additional documentation needed for title or buyer promptly to ensure smooth closing
158. Attend closing with seller
159. Review documents/assist title agent to insure seller understands all documentation to be signed
160. Coordinate key exchange with buyer's agent
161. Have a "no surprises" closing so that seller receives net proceeds check at closing
162. Change MLS status to sold once the sale is complete
163. Place sold sign on yard sign
164. Remove Supra box from door and pick up marketing materials from inside the house
165. Scan complete files for records
166. Make copies of required documents for year end
167. Close out file
168. Coordinate seller's next purchase, if requested to assist
169. Refer sellers to one of the best agents at their new destination, if relocating
170. Update seller contact information, new address, new phones, etc.

Follow up After Closing

171. Answer questions about claims with Home Warranty company, if requested
172. Attempt to clarify and resolve any conflicts about repairs, if buyer is not satisfied
173. Respond to any follow-up calls and provide any additional information required from office files

This list is by no means an attempt to set forth a complete list of services as they may vary within each brokerage and each market.

By the same token, some transactions may not require some of these steps to be equally successful. However, most would agree that given the unexpected complications that can arise, it's far better to know about a step and make an intelligent, informed decision to skip it, then to not know the possibility even existed.

Through it all, the personal and professional commitment of myself, a REALTOR®, is to ensure that a seller and buyer are brought together in an agreement that provided each with a "win" that is fair and equitable.

The motivation is easy to understand. For most full-service brokerages, they receive no compensation unless and until the sale closes.

By contrast, there are firms that offer "limited services" in exchange for an up-front flat fee, or perhaps offer a menu of pay-as-you-go or "a la carte" options. Some even offer a sliding scale ranging from limited to full service. In these cases, the compensation of the REALTOR® is based on these reduced service levels with the seller bearing full responsibility for all the other steps and procedures in the selling process. In short, the marketplace truism is that "you get what you pay for".

Questions Prior to Final Selection Decision on a Listing Agent

You should consider the opportunity as interviewing for the job! Be prepared to answer the following questions during your listing presentation:

1. How long have you been licensed as an agent (EXPERIENCE)?
2. How many homes did you sell last year and for what average price (PERFORMANCE)?
3. How many clients are you currently working with (ACCESSIBILITY)?
4. What's your average days on market (PERFORMANCE)?
5. Please advise of any professional designations, i.e. CRB, CRE, CRS, GRI, etc. (PROFESSIONALISM/KNOWLEDGE)
6. Any special recognitions or award levels? (PERFORMANCE/KNOWLEDGE)
7. How many homes have you sold in a 5-mile radius of my home? (AREA KNOWLEDGE)
8. Any additional marketing strategies you would use to differentiate my home and get the best price? (PERFORMANCE)
9. Do you think you can get what my home is worth—are you a tough negotiator? (PERFORMANCE)

Section TEN

Where to Go for Additional Resources and Answers

- **Additional Resources are available on your branded extranet – both Real Living Business Center and Berkshire Hathaway HomeServices Resource Center. Use your brand’s tools, including Buyer/Seller Guides, Lifestyle Planning Guides, customizable marketing pieces and other differentiators.**
- **Each brand’s Learn Centers contain the Referral Channel rCertifiedSM Curriculum; Module 3 contains the Eleven Key Elements downloadable materials for use when working with Sellers. Completion includes a certificate to demonstrate to sellers that agent has specialized training in relocation which will enable them to protect and maximize the transferee’s benefits.**
- **Utilize branded Facebook pages and chatter groups to exchange best practices, and to seek peer input (Berkshire Hathaway HomeServices Relocation Directors and Real Living Brokers, Owners, Managers FB pages)**
- **Contact Broker.Alliance.Management@BGRS.com for relocation file and process related matters and for any questions about broker network eligibility or BGRS billing.**
- **Contact HSF Affiliates Referral Channel Development with questions and for support: ReferralChannel@hsfranchise.com**
- **Reach out to PITT Crew members to thank them for their contributions to this work effort, and to exchange referrals and best practices.**

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