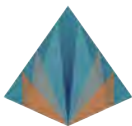




Stacia Weishaar's Ultimate Client Experience



The Defining Difference
BY CINDY ERTMAN

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ULTIMATE CLIENT EXPERIENCE

LEAD	
Action	Ownership
Thank you email to referring individual (move to bcc). Introduction email with link to Calendly (Stacia's calendar) to schedule first call and more information about the team (Zillow Reviews)	Stacia
Thank you to past client for referring lead or agent – Handwritten note	Vicki
Input name, address, email address, phone number into CRM	Vicki
Initial call build trust through asking questions – input into Airtable/CRM for team Include special notes (i.e., pets, sports, etc.) Ask the ultimate question: “What is it about buying a home that is so important to you?”	Stacia
Add to Drip Campaign in Salesforce – as needed	Vicki
Friend request client and realtors (Facebook, LinkedIn, Instagram)	Alyssa (Vicki to forward)
Email client (cc team) application email, next steps, CC agent	Stacia
APPLICATION RECEIVED	
Email “Application Received” to borrower and also to agent attached	Allycyn
Email to client and agent stating preapproval amount link to Stacia's Calendly to schedule a pre-approval meeting Link to Team Weishaar Booklet in client email (via Issuu)	Allycyn
After pre-approved, send client handwritten card with reusable water bottle and a NUUN	Vicki
SCHEDULE INTIAL MEETING	
Review Mortgage Coach and pre-approval in detail with client and video uploaded into Mortgage Coach	Stacia
RENTERS Email to client: MBS Highway - Rent vs. Buy. <i>For renters – send MBS Highway Analysis (new line).</i> BombBomb BB – pre-approval video – once preapproved the dos and don'ts.	Stacia
OFFER SUBMITTED	
Send updated Cost Analysis to client	Allycyn
Call listing agent once offer is submitted. If they don't answer, video text the listing agent to share the strength of your buyer.	Stacia
Send email to listing agent confirming strength of buyer (cc selling agent)	Stacia
LOST DEAL	
Send “You Broke Up with Me” email	Stacia
MUTUAL CONTRACT	
Send client email with Moving Packet - PDF	Vicki
Moving with kids. Send “Moving Day” BB book to kids with note	Vicki
Moving with pets. Send cat/dog toy with note and article about moving with pets. (\$9-10 range)	Vicki
Congrats email with team introduction through Bomb Bomb video to explain “what to expect next”.	Stacia
Buyer agent – send mutual congrats Handwritten card	Vicki
Seller – send mutual congrats Handwritten card	Vicki
Listing Agent - email congratulations, introducing team, setting expectations on communication. Link to Team Weishaar WHY, How, What book (via Issuu)	Stacia

APPRAISAL RECEIVED AT VALUE (OR ABOVE) AS IS	
Action	Ownership
Call selling agent first – offer the selling agent to share the news first with the buyer	Stacia
Email selling agent and buyer agent “we received the appraisal back at value as is” - after phone calls	Vicki
Email buyer/borrower that appraisal is in, the value, and that copy has been uploaded to the portal	Vicki
LOAN IS APPROVED – CALLS & EMAIL	
Send client email (from Team email) – File is clear and moving into loan documents	Holly
Call client, listing agent and selling agent CTC	Stacia
EXPECTATIONS TO CLIENTS FOR SIGNING & CLOSING	
a. Email Buyer side only Settlement Statement. Send email to client.	Holly
b. Review line by line with client and buyer’s agent on the call. Ask for feedback.	Stacia
FUNDING/SIGNING/CLOSING	
Congratulations email and thank you. Send link for review on Zillow and to follow us socially @delightfulrefuge Ask for charity of choice for donation to be made in their name	Stacia
Send congratulations email to clients & agents	Holly
Listing agent – closed congratulations Handwritten card	Vicki
Selling agent – closed congratulations Handwritten card	Vicki
Listing agent call – closed congratulations	Stacia
Selling agent call – closed congratulations	Stacia
Closing gift sent to client (monthly – Pillow and Electronic Home Binder)	Vicki
Sign client up for HouseHappy	Vicki
Upload client to HomeBot	Vicki
30-DAYS POST CLOSING	
Send 30-day follow-up via Slybroadcast to clients 1) Reminding client of first payment 2) Asking if client needs anything for home or financially	Vicki
3 TO 6 MONTHS	
Birthday greeting emails auto sent through Salesforce	Salesforce - auto
180 DAY CHECK-IN	
Handwritten note sent via Handwritten	Vicki
ANNUAL REVIEW	
1) Email sent to client with form to complete annual review questions online with link to Calendly for meeting 2) VM dropped via Slydial and Stacia calls clients Goals: a. Review HomeBot as a tool b. Life Insurance is a major topic here c. Review Mortgage Coach with client d. Circle back with client agents if anything comes up, i.e. CMA, thinking selling, life change, etc. e. End of convo – as always, your biggest compliment is the referral of friends or family to our business.	Vicki/Stacia