



Success Scripts

Helping you bring more value to your clients and referral partners

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Realtor Script for New Buyers



Mr. and Mrs. Smith, I just want to make sure that you know that I actually believe that paying up to 3% for a buyer's agent to just simply help you buy your home for 30 days is likely too much. Now, the industry has gotten away with that for a long time because the seller has really built it into the purchase price of their property.

Well, with a lot of these normal happenings changing,

I want you to know that, and I think that 3% is likely a little too high.

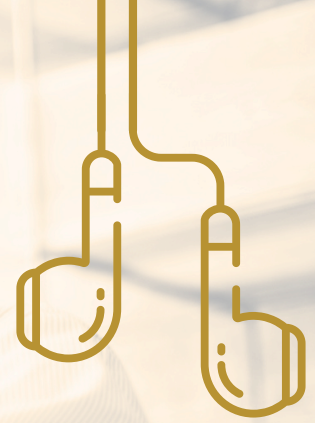
“But for whatever commission you pay our team, I want you to know that you're not just going to get 30 days worth of help in a transaction, you're going to get 30 years worth of proactive advice, guidance, strategy, and our ongoing commitment to helping you and your family not just own a home. But to become extremely successful homeowners in every aspect of real estate or finance”.

You'll have our team along with our finance team, proactively helping you set goals, manage changes and evolutions in your life, deal with your real estate portfolio, understanding how to manage your equity, understanding how to utilize debt and leverage and our commitment is that you will be much more generationally wealthy over time, because of our ongoing commitment that we have to you as a partner. That is very different than a commission you would pay for somebody who would help you buy a home, and then really not talk to you much other than send you marketing from time to time and wait for you to make your next decision. So please know that when you're comparing real estate professionals, not everybody is the same when it comes to the value you're getting. I would argue that the value you get prior to a transaction from our team and our finance team is incredibly important. The actual transaction itself is probably the least important, although we're going to do a really great job there. But when you're identifying our value versus other real estate agents

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values during a transaction, oftentimes you'll find mostly an equivalent experience, right? Because it's just customer service contracts, doing things on time. The biggest area and why the majority of our clients choose us is because there's not many, if any real estate professionals who are going to be as committed to helping you proactively, and the next 30 days of a transaction are really going to be where this relationship starts. So I just want you to be clear on that. commissions with our organization. Get you 30 plus years worth of service versus commissions with a standard organization usually get you about 30 days.

Client Script: Post-Closing Call



1 Congratulations on your closing

2 1st payment date and directions

3 When are you moving into the home (Where will all closing gifts be sent?)

- How did you enjoy the relocation technology we helped you with (Updater)? Did you get everything transferred over and how was your experience with that service?

4 Zip Drive being sent to you with all pertinent info

- Note, Appraisal, Deed, Closing Disclosure and 1st payment letter.

5 The Art of Homeownership

- Home Concierge, Monthly Wealth Report, Annual Financial Review, Perfect Mortgage Promise, Maximizing Wealth through Real Estate
- Explain in detail why it's so important that they use all of the services and why they engage with you on the annual financial review and why they should ALWAYS take your call, because it will benefit them and we'll never sell them anything!

6 What did you think of the service of the team? Was there any one thing that stood out to you that you loved the most about our service? Was there anything that we could have done to have improved your experience?

Great, my marketing team is going to send you an email with a link to Zillow, Google and Yelp. Can you please take a few minutes to comment on your experience with our team? It is extremely important for us to let our future clients know what our existing clients think of us and I would consider it a HUGE favor if you could help us there. Then say "Thank you so much, I really look forward to reading it!"

- If the client has great personality and gives a great review, ask for a video testimonial!

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- 7 Future Real Estate Goals – What future goals in real estate do you have or are you interested in long term?**

 - Explain how we are going to help them accomplish those goals and plan for the future.
- 8 Referrals** – As we talked about in our initial meeting, the reason we are able to offer the level of service and commitment to our clients over the years is because we don't spend time prospecting for new clients or marketing for people who don't know us. So, we really depend on our clients to help spread the word about us and I was wondering, who do you know that would benefit from our educational based service that may want to develop a plan for buying a home? It's OK if you can't think of anyone now but moving forward, please don't hesitate to let me know and we'll be sure to take great care of them.
- 9 Referrals for you** – We always want to make sure that we're helping our clients in EVERY aspect of real estate and finance so I want to ask, do you have relationships with a CPA, Financial Planner and Estate Planning Attorney? If yes, how would you rate their value to you on a scale of 1 – 10? (Refer back to their current professionals rating that they gave and ask if you can reach out to schedule a meeting, or if you should refer a new professional to them).
- 10 Mail** – You are going to be getting mail from a lot of companies trying to look like us to sell you something and other lenders as well. If you have any questions call us, but for the most part, you can disregard mail that talks about mortgage insurance, bi-weekly payments, etc. Important items are Property Taxes, Supplemental Property Taxes and Homestead Exemption Form.
- 11 Corporate/Work Connection** – We would like to offer your co-workers the Art of Homeownership, who should we connect with at your company to talk more about this?
- 12 Referrals to you (When Appropriate based on Job)** – Lastly, I noticed that you are in the _____ Profession. As you know, I come across people in all industries with many different needs, so if you don't mind, can you tell me what I should be looking for to help you with your business?

Client Script: Personal Economy



A lot of times our clients will ask us if now's a good time to buy a home because they're concerned about an impending recession, or the real estate market losing value. Our answer is always the same every time.

“You can't make your decision based on what the global economy or the national economy will do, because there's no way to actually know. So the one thing we can focus on is your own personal economy.”

And if you haven't already sat down with a financing team to help you really work through your personal economy as it relates to real estate, we highly suggest you do, and our team would be happy to help you with that.

A good example of looking at your personal economy, as opposed to the potential of a recession, is to look at people that bought homes in 2005, and 2006. The market crashed a few years later but for those people that had a good understanding of their situation and a long term plan, they still own those homes and they have a much higher net worth today than they would have if they didn't buy a home at the second worst time since the history of the Great Depression.

So again, you don't want to make your decision based on an uncertain future of what may happen in the real estate market. But what we can do is look at how to protect you from a potential real estate decline, help you better identify your short and long term goals, and ultimately help you make a really confident decision as to if you should or shouldn't buy a home now. Our team will be happy to help you with that and we can help you make a good decision.

Corporate Affinity Partnerships

Initial Phone Call to HR or Management of a Company



Hello _____,

Thanks so much for your time. The reason I am reaching out to you is because we have a really interesting corporate benefit program that helps employees understand their real estate and finances at a higher level. It's called the [\[Name it here\]](#), and if your employees become members, we will provide a number of highly valuable and unique services which will help them reduce stress, become much more educated and informed about everything real estate or financially related and ultimately be more successful in and outside of work.

It's important to know that this platform doesn't cost you anything as the employer and is also completely free to your employees. Just know that we are not trying to sell anything. The reason we do this is because we know that most people want this information and need these services and it's our way of providing value to our current and future clients.

I would love the opportunity to present this to you and anyone else at the company that you think should learn about it. We have partnered with many large organizations, professional sports teams and government agencies, all of which saw a high level of value and we received great feedback from their employees. When these organizations and their executive teams saw what we could offer their employees and how much it not only benefited the employee, but them as the employer as well, they were excited to have us help.

What questions do you have that I can help answer for you?

What would be the best day and time for us to schedule a time to present this to you and your company?

Note:

Do some research on the company before the call. You can find out how much the average employee makes at that company, by searching on [glassdoor.com](#). Also, try to find out the demographic (younger, middle aged with families, older, etc). Based on what you find, you want to touch on the key issues that you know their employees almost all face, then tell them how your offering will provide a solution for those.

Once their employees know what they can have access to, we know that they will want it. It's your job to convince the employer of that fact.



Two Path Script for Potential Home Buyers

When a buyer says that they would like to go look at a home or multiple homes and they are either not approved yet, or they have only been pre-approved.

“I would love to help you through the process of buying your new home! Now there are two paths that we can walk down to do this that I want to explain to you.”

The first path would be that we can go look at homes now. It's likely that when we're looking, you're going to find one that you really like and may want to make an offer on. However, if you like it and it's priced right, it's likely that others will like it and want to make offers as well. If you haven't been pre-approved, we'll have to scramble to get that done in a short period of time and hope that it can be completed in time to make an offer before the home is sold. If you have already been pre-approved, then we'll be able to make the offer right away, but we'll look just the same as every other offer, that also needs to be pre-approved. Because of this, we'll have to be sure to offer more money than the next offer in order to stand out and have the seller choose our offer. As you can imagine, a lot of this can be stressful and it probably won't give us the best chance to get the home you want at the price that we want to get it.

The second path would be for you to meet with our lending team and they can actually get your loan Fully Approved, through Underwriting, prior to us looking for homes. They will do all of the due diligence that a normal lender would do during the transaction, prior to the transaction. This will not only reduce your stress levels and give us the confidence to go look for the right home, but it will give us a significant competitive advantage versus other offers. Because of the Full Loan Approval, we can look just like an all cash offer. We can write an offer that will allow us to close in 15 days, just like a cash offer and we can remove our loan contingency on the offer, to have the same risk tolerance as a cash offer.

(At this point, you'll want to explain contingencies and what they mean to the buyer and seller, in case you haven't already)

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We've used this strategy with a countless number of clients and we've been able to see those clients get their offers accepted more often, which avoids the emotional roller coaster of losing out on a home, and they have also been able to save substantial amounts of money on the price of the home by not having to always be the highest priced offer.

Knowing these two paths, do we want to go look at homes now, or would you like to speak with our lending team about your Full Loan Approval?