houseful

Live transfer script

Location, price, motivation

AGENT: Hi [Customer name], I understand you're calling about 123 Main Street. Is that right?
***If you are not in a location where you can look up information, let the buyer know but continue with the script to get more information and establish a relationship.*

AGENT: Excellent, I can help you with that. While I'm pulling up that property, let me make sure I have your correct contact information in case we get disconnected.
[Customer gives info]

Location

AGENT: Thanks! Nice to speak with you, [name]. Okay, the home you called about is located in the [neighborhood/area name] area. Is that the location you are looking to purchase in?

CUSTOMER: Yes.

AGENT: Great! Well, I'm happy to help. Just a quick bit of information about me - I've been an agent for [X] years. I am very familiar with this neighborhood and it's one of the areas I exclusively sell in so I'm really glad we were connected. Just curious, are there any other areas that you are interested in?

CUSTOMER: [Names other areas.]

Motivation/Price

AGENT: All great locations. Do you live in this area currently or want to make a move there?
[Try to establish their reason for moving - work, school, family, etc. to start the conversation.]
Okay, well the home you called about is listed at [price]. Is that in the price range you are looking for or do you have a specific budget in mind?

CUSTOMER: We were looking for something in the range of [xxx].

Motivation

AGENT: Perfect. Now, out of curiosity, how soon are you looking to get into a new home?
CUSTOMER: [Customer responds with their time frame and reasoning.]
AGENT: Sounds good.

Agent
AGENT: And how long have you been looking for a new home?
CUSTOMER: We've been looking for about [time frame].
AGENT: Nice. And have you toured any homes yet?

> If they have toured homes:
> AGENT: And have you toured those with an agent or have you been going to open houses?
>
> If they have toured with an agent:
> AGENT: Oh okay. And are you committed to working with that agent on this purchase or signed an agreement with them?
>
>> If they are under a buyer's rep agreement:
>> AGENT: Unfortunately, CREA rules prohibit me from assisting anyone that already has a representation agreement in place with an agent.
>>
>> If not under agreement with an agent:
>> AGENT: Ok great. Well, I will be happy to help and show you this home and any others you are interested in. I just need to get some quick information.

AGENT: Do you currently rent or own?
CUSTOMER: [Client responds with whether they rent or own.]

> If they own:
> AGENT: Would you need to sell your current property before you buy?
> CUSTOMER: [YES]
> AGENT: Do you have someone you plan to use to help you list your property for sale?
>
>> If they <u>do not</u> have a listing agent:
>> AGENT: Okay, Well when you get to that point I would be more than happy to help you with that process. In the meantime, let's talk more about what you are looking for in your next home.
>>
>> If they already have a listing agent:
>> AGENT: Oh okay. Are you planning to use that same agent to assist with your purchase?
>>
>>> If no… Proceed with Script

If yes… Advise that unfortunately, you can't assist them in their search if they already have an agent they are working with exclusively.

If they rent:
AGENT: Are you month-to-month, or are you in a long-term lease?
CUSTOMER: [Customer responds to agent's questions about terms of lease.]

Mortgage
AGENT: So can you tell me a little bit about where you are in the home-buying process? Have you had a chance to speak with a lender about getting pre-approved or will you be paying cash?

If they need a mortgage:
AGENT: If you would like, I can put you in contact with one of the lenders I work closely with. I can have them reach out to you directly or I can forward you their contact information and you can call them. Which do you prefer?
CUSTOMER: [Responds]
AGENTS: Just so you are aware, you will need to have a pre-approval letter from a lender if you want to make an offer on any of the homes we tour. It is a pretty quick process but it's better to get the ball rolling now.

If they are paying cash:
AGENT: Excellent! That makes things easy since you won't have to worry about financing.

Appointment
AGENT: At this point, I would love to schedule a time to meet with you so we can take a look at this home and possibly any others that might interest you. Would later this week or weekend be better for you?
CUSTOMER: [Answers]
AGENT: And do you prefer morning or afternoon?
CUSTOMER: [Responds]
AGENT: I have [time] on [day] open - does that work?
CUSTOMER: [Responds]
AGENT: Perfect! I will reach out to the listing agent and request a showing.

AGENT: Well, I think I have all of the information I need right now. Do you have any questions for me?
CUSTOMER: [Responds]
AGENT: I'm really looking forward to meeting you in person. In the meantime, I will send you an email with a recap of our conversation that will have all of my contact information in case you think of any questions. I will also let you know as soon as I have the showing time confirmed. Would you like me to send you some other properties in [neighborhood] that I think might interest you?
CUSTOMER: Yes
AGENT: Sure - what is the best email address for you?
CUSTOMER: It's xxxx
AGENT: Great - it has been really nice talking with you, [name] and I'll see you on [xx at xx]!

I got a live transfer: Now what?

Do	Don't
Write down their contact information in case you are disconnected.	Jump straight into the property information without trying to gain their trust first.
Check the status of the property and scan for listings information.	Give up if the property is no longer for sale. Offer to show them other properties in the area with similar features.
Ask questions and look for something in common to build a connection. Try to understand their motivation for moving.	Rush through the conversation or get distracted by multitasking.
Give them your full attention! Listen and take notes.	Ask too many personal questions too quickly. Connect first.
Wait to ask detailed questions about their finances until you have established rapport.	Assume they understand the process. It's your job to explain it.
Once you've shown value as an agent, set an in person meeting.	Hang up before explaining the next steps.