

# VIP BUYER AGENT SERVICES

**NAME** \_\_\_\_\_

**DATE:** \_\_\_\_\_



## Ways to Communicate

In order to exceed your expectations and make this a smooth and successful closing, I'd like to know your expectations of me and let you know what my expectations will be of you.

Name: \_\_\_\_\_ Property: \_\_\_\_\_

If you get my voicemail, please leave a message, letting me know the best time to reach you, and I will respond promptly.

### *Your Communication Expectations*

1. During the day, what is the best way to contact you?  
 Phone (Work / Home / Cell)  Email  Text  
 Appropriate number or email address: \_\_\_\_\_
2. If I need to call you at work, what days/hours do you work?
3. If I have to get your signature, what is the best way to handle it?  
 Online e-signature  Fax  Come in to office  
 Fax number: \_\_\_\_\_
4. How often do you expect to hear from me?  
 Only when there is news  Weekly  Other Explain: \_\_\_\_\_

### *My Expectations of You*

1. Don't hesitate to call if you have any questions or concerns.  
 If I don't have the answer, I will find out or point you in the right direction to get it.
2. Timely return of phone calls, if any return information is required.
3. Timely return of all documents requiring signatures.

*Please return this form immediately with any other requested paperwork in the envelope provided.*



REALTY ONE GROUP  
RESULTS

---

# Buyer Tools



# Buyer Lead Sheet

Date: \_\_\_\_\_

Lead Source/Property that prompted call: \_\_\_\_\_

<b>CONTACT INFO</b>	
Name _____	
Email _____	
Street Address _____	Children's Names _____
_____	_____
Home Phone _____	Cell Phone _____
Work Phone _____	Fax _____
What is the best way to get in touch with you? _____	What times are best? _____

## Buyer Consultation Prequalification Questions

- Has a sales representative taken you out and shown you any properties?  YES  NO If yes, how's that going? \_\_\_\_\_
- Is there anybody else buying the home with you? \_\_\_\_\_
- Who will be living in your home? \_\_\_\_\_
- How long have you been looking for a home? \_\_\_\_\_
- I'm just curious, why are you moving? \_\_\_\_\_
- Are you renting or do you own now?  RENT  OWN  
 Renter: Do you know when your lease is up? \_\_\_\_\_  
 Owner: Do you need to sell your current home before you buy your next home?  YES  NO  
 If yes: Have you signed a listing agreement with a sales representative to sell your home?  
 YES  NO  
 If no: When would be a good time for us to get together so I can give you a free market analysis on your home? \_\_\_\_\_
- Are you going to be paying cash or will you be getting a mortgage for the purchase of your home?  
 CASH  MORTGAGE  
 Mortgage: Have you already been preapproved by a lender? \_\_\_\_\_  
 If yes: Who are you working with? \_\_\_\_\_  
 What is the amount you are preapproved for? \_\_\_\_\_  
 What will your down payment be? \_\_\_\_\_  
 If you want to recommend a lender. I have three trusted lenders who always provide top quality service. They often help buyers save money either on a monthly basis or on initial costs. Would you like their contact information? \_\_\_\_\_



- 8. What price range are you comfortable with? \_\_\_\_\_
- 9. Is there anyone else who will be involved in your home buying decision? \_\_\_\_\_
- 10. On a scale of 1 to 10 with 10 meaning you must buy a home as quickly as possible and 1 meaning you are not sure you'll really buy anything, how would you rate yourself? \_\_\_\_\_  
*Anything less than 10: What would it take for you to become a 10?* \_\_\_\_\_
- 11. When do you need to be in your new home? \_\_\_\_\_
- 12. I'd love to help you buy a home. In order to help you find a perfect home, all we need to do is set an appointment (with all of the decision makers), so I can help you get what you want in the time you want. What is a better time for us to meet? (day) \_\_\_\_\_ at (time) \_\_\_\_\_,  
or (alternate day) \_\_\_\_\_ at (alternate time) \_\_\_\_\_?

Appointment date and time: \_\_\_\_\_

Other Information

---



---



---



---

Information to Remain Confidential

---



---



---



---

Behavioral Style: D I S C

## Buyer Consultation Questionnaire

### *Lifestyle*

---

1. Who will be living in the home you purchase?
2. Will anyone else be spending more than an occasional overnight stay (e.g., parents)?
3. Describe your lifestyle. What do you enjoy doing at home? (e.g., Do you do a lot of entertaining? How do you spend your time in the evenings and on the weekends?)
4. Does your home need to accommodate any special needs?
5. Do you have any pets?
6. Do you have anything special that needs to be accommodated such as athletic equipment, fine art, large furniture, or a large collection?
7. When people come to your home, what do you want your home to say about you?
8. Is there anything I should know about your lifestyle that I have not asked?

### *Location*

---

1. Tell me about your ideal location.
2. What is your maximum commute time and distance?
3. What is your work address?
4. Are schools important?
5. Is there a particular view you are seeking (e.g., skyline, lake, mountains)?
6. What else is important about your location?



*House – General*

---

1. Do you have a preference for when the house was built?
2. Do you want a house in move-in condition or are you willing to do some work on it?
3. When people come to your home, what do you want your home to say about you?
4. Do you want to have a swimming pool or hot tub?
5. Are you looking for any structures such as a greenhouse or shed?

*House – Structure/Exterior*

---

1. What type of home are you looking for (e.g., single-family, condo, townhouse, etc.)?
2. Approximately what size house are you looking for (square footage)?
3. How many stories?
4. What size lot would you like?
5. What architectural styles do you prefer?
6. What type of exterior siding will you consider?
7. Do you want a porch or deck?
8. What are you looking for in terms of a garage (e.g., attached, carport, etc.)?
9. What other exterior features are important to you?

*House – Interior*

---

1. What kind of style do you want the interior of your home to have (e.g., formal, casual, cozy, traditional, contemporary)?
2. What kind of floor plan do you prefer (e.g., open vs. walls between all living spaces)?
3. In general, what are your likes and dislikes for the interior of your home?



### *Bedrooms*

---

1. How many bedrooms do you need?
2. How will each of those rooms be used?
3. What are your preferences for the master bedroom?

### *Bathrooms*

---

1. How many bathrooms do you need?
2. What are your needs for each of the bathrooms?

### *Kitchen*

---

1. What features must your kitchen have (e.g., breakfast area, types of appliances, etc.)?
2. What finishes do you want (e.g., countertops, flooring, appliances, etc.)?
3. What are your likes and dislikes for the kitchen?

### *Dining Room*

---

1. Would you like the dining room to be part of the kitchen configuration? What about the living room?
2. What size dining room table do you have?

### *Living Room/Family Room*

---

1. Describe your likes and dislikes.
2. Do you want a fireplace?
3. What size room(s) do you have in mind?
4. What other rooms do you need or want?
5. What else should I know about the inside of the house you are looking for?





My 10+ Customer Service Agreement for Buyers	✓
1. Provide you with 10+ customer service during the entire buying process.	
2. Organize and schedule your home search process.	
3. Discuss the benefits and drawbacks of each home in relation to your specific needs.	
4. Provide you with ongoing updates on available homes.	
5. Help you to compare homes and make a decision.	
6. Advise you on the terms and issues of the offer and fill out the purchase order contract.	
7. Present your offer and negotiate on your behalf.	
8. Coordinate and supervise the preparation of all closing documents and guide you through the closing process.	
9. Help you resolve any closing issues.	
10. Coordinate move-in and assist with any postclosing issues.	



## Buyer 10+ Experience Questionnaire

1. Here's a list of what you can expect from me. I want you to tell me how important each of these items is to you. Let's use a scale of 1–10, with 10 being "extremely important" and 1 being "not necessary."

I will always respect your time and will try to accommodate you.	1 2 3 4 5 6 7 8 9 10
I will respond to your phone call or emails as quickly as possible.	1 2 3 4 5 6 7 8 9 10
I will discuss the benefits and drawbacks of each home in relation to your needs.	1 2 3 4 5 6 7 8 9 10
I will always be honest with you, even when I have information that you may not want to hear.	1 2 3 4 5 6 7 8 9 10
I will search the MLS daily and inform you of all new homes that meet your wants and needs.	1 2 3 4 5 6 7 8 9 10
I will help you compare homes and make a decision.	1 2 3 4 5 6 7 8 9 10
I will keep your information confidential.	1 2 3 4 5 6 7 8 9 10
I will provide you with a CMA on all the homes you're interested in.	1 2 3 4 5 6 7 8 9 10
I will educate you on the contract and all of its terms.	1 2 3 4 5 6 7 8 9 10
I will always negotiate price and terms in your best interest.	1 2 3 4 5 6 7 8 9 10
I will coordinate and supervise the preparation of all closing documents and guide you through the closing process.	1 2 3 4 5 6 7 8 9 10
I will refer you to proven professionals throughout the entire process.	1 2 3 4 5 6 7 8 9 10

2. Now that I've told you how I work, please tell me what else will make this a "10+ experience" for you. \_\_\_\_\_

Can you describe exactly what I need to do to accomplish that? \_\_\_\_\_

Can you tell me what about that is important for you? \_\_\_\_\_

3. If we could add one more thing to make it a 10+, what would that be? \_\_\_\_\_

Can you describe exactly what I need to do to accomplish that? \_\_\_\_\_



Can you tell me what about that is important for you? \_\_\_\_\_  
\_\_\_\_\_

4. If we could add one more thing to make it a 10++, what would that be for you? \_\_\_\_\_  
\_\_\_\_\_

Can you describe exactly what I need to do to accomplish that? \_\_\_\_\_  
\_\_\_\_\_

Can you tell me what about that is important for you? \_\_\_\_\_  
\_\_\_\_\_

5. Have you ever worked with a sales representative or consultant before?  
 No  Yes Tell me more: \_\_\_\_\_  
\_\_\_\_\_

What did you like best about what this person did? \_\_\_\_\_  
\_\_\_\_\_

What didn't you like? \_\_\_\_\_  
\_\_\_\_\_

6. How does someone win with you? \_\_\_\_\_  
\_\_\_\_\_

Anything else? \_\_\_\_\_  
\_\_\_\_\_

7. How does someone lose with you? \_\_\_\_\_  
\_\_\_\_\_

Anything else? \_\_\_\_\_  
\_\_\_\_\_

8. When I advise you on your home purchase, on a scale from 1 to 10, with 1 being indirect and 10 being absolutely direct, how do you want me to communicate with you?

10

Less than 10. Can you tell me what you mean by that? \_\_\_\_\_  
\_\_\_\_\_



## Prepare to Show Homes Checklist

- Set the home tour date with your buyers.
- Time permitting, preview the homes and eliminate any that do not meet their criteria.
- Determine which route to take, always showing the best homes first.
- Call the sellers the day before the tour to schedule the show times, and rearrange your route if necessary.
- Arrange to meet with your buyers at your office or in front of the first home you will be touring.
- Determine the most efficient route to take.
- Print out two detailed MLS information sheets for each property you plan to tour with your buyer.
- Place the MLS information sheets in the order you will tour the properties and include a Home Tour sheet for each one so that the buyer can record their own comments.  
Make one set for your buyer and one for yourself.
- Make a copy of the Five Must-Haves sheet that was filled out during the Buyer Consultation, and include it with the MLS and Home Tour sheets you will give to your buyers.

## Checklist for Preparing an Offer

- Obtain the buyer's preapproval letter from their lender. Your client's offer will be more attractive to the seller if a preapproval letter is submitted at the same time.
- Ensure the property is still available before spending any time preparing an offer. Even if your MLS indicates the listing is active, contact the listing sales representative to let them know that your client is considering making an offer. If it's off the market, let your buyer know immediately and promptly begin the search for another home.
- Produce a Comparative Market Analysis (CMA) to educate and inform your buyers. A CMA is an analysis of comparable recent sales and pending conditional sales in the neighbourhood. You'll learn how to create a CMA in *Power Session 15: Price Right and Present Your CMA*.
- Contact the listing sales representative to build rapport and gather as much information about the seller and the property as you can. As you learned in *Power Session 6: Prepare to Work with Buyers*, knowledge is power!
  - Find out how much the seller paid for the property and how much they still owe. This is public information in most areas.
  - Ask questions of the listing sales representative to discover what's important to the seller. Find out their time frame and motivation for moving. This allows you to customize the buyer's offer to address the seller's most pressing needs.
  - Inquire about the activity on the property, such as the number of showings and the time-on-market.
  - Obtain a Seller Property Information Statement, which provides details on any physical and historical problems with the property of which the seller is aware.
  - Find out if there are or have been other offers. If so, what is their status or why did they fall through?



## Checklist for Writing an Offer

- Price and Terms:** Consult with your buyer to arrive at the most logical offering based on the CMA. In the upcoming exercise, you'll learn what to say when your client wants to make a low offer.
- Seller Property Information Statement:** Review this statement with your client to find out if there are any deal-breakers.
- Fixtures and Chatels:** Consider what items in the home will transfer to the buyer. Typically, attached fixtures stay and movable items go with the seller. In some areas, the seller's disclosure will specify which items transfer. These items are often up for negotiation.
- Deposit Money:** Buyers make a deposit to the seller to show good faith in the transaction. This deposit money is typically deposited in a trust account that is held by the listing brokerage. Determine an amount that would be acceptable to both your buyer and the seller. In many markets, 1 percent of the purchase price is normal. Check with your Team Leader about how deposit money is handled.
- Time for Seller Acceptance:** Be sure to specify the time for acceptance.
- Financing Terms:** Make sure the financing terms would be agreeable to your buyer and the seller.
- Buyer Preapproval Letter:** Include this letter from the buyer's lender when you submit the offer.
- Loan Approval:** Allow your buyer ample time to finalize their financing. Check with your Team Leader for the average business days to be expected.
- Closing Date:** Make sure that the closing date will work for your buyer, their lender, and the closing company. Tuesdays, Wednesdays, and Thursdays are the best days to close because they are in the middle of the week; therefore, you have an extra business day before or after if needed to complete the transaction.
- Home Warranty:** Review any home warranty considerations.
- Repair Limits:** Obtain the inspection report and focus on the items the buyer is most interested in repairing. The only issue is likely to be whether you ask them to do the repairs before closing or amend the purchase price in the amount of the repair. In the upcoming exercise, you'll learn what to say when your client wants the seller to make repairs.
- Special Clauses or Contingencies:** These are special conditions that must be met in order for the contract to close, such as a satisfactory inspection report or the buyer obtaining funding. Carefully write any special clauses or contingencies your buyer would like to include in the offer.
- Cover Letter:** Include a cover letter when you submit the offer.

## The Five Must-Haves

1. What are the top five things your home needs to have?

*(Note: You will also write these down in their buyer's guide and use them during the showing process.)*

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4) \_\_\_\_\_

5) \_\_\_\_\_

2. Beyond those five things, what is something else you really want to have?
3. If you could have something else, what would that be?
4. If you could have one last thing to make this your dream home, what would that be?

## My Expectations

What I Expect From All of My Clients	Done
Be honest in all things.	
Be available to look at homes.	
Let me know when you're out of town.	
If your wants, needs, or financial situation change, let me know.	
If you want to see new construction, call me before you go into models, as there is a good chance that I have either worked with the builder/developer before and have toured or sold their homes before.	
If you see a FSBO, call me first with the street name and telephone number, as there's a good chance I have already toured the home.	
If you see an ad, sign, or information on the Internet, call me so I can provide you with a CMA.	
Let me know if you plan to go to open houses so I can help you if you see anything that you like.	
Be as loyal to me as I am to you.	
Refer me to your friends, family, or colleagues. Give me their names and telephone numbers.	





## Buyer Sales Representative Contract-to-Close Checklist

Task	When	✓
Submit contract and earnest money to title/escrow company	Date specified in contract	
Deliver earnest money to listing sales representative	At execution of contract	
Schedule structural and termite inspections. Arrange geological and other inspections, if needed	As early as possible	
Obtain loan approval in writing	As soon as possible	
Negotiate for repairs and treatments	After inspections, use amendment to request repairs and treatments. If there is a contingency period, this should be done before the dates in the contract	
Schedule survey (if necessary)	Within deadlines of contract	
Schedule appraisal (or ensure appraisal has been scheduled)	Within ten days of loan application	
Schedule closing appointment, if necessary	The week of closing	
Final walk-through with buyer	After repairs and treatments are complete, before closing	
Coordinate move-in dates	Work with listing sales representative to coordinate dates	
Confirm that loan will fund on time for closing	Work with lender to determine date	
Have client review HUD-1 Settlement Statement with closing or escrow sales representative for accuracy	Prior to closing	
Attend closing (required in some states)	Closing date	
Receive your payment (from title/escrow company)	After closing and funding	

## Closing Packet Introduction Letter for Buyers

[Today's date]

[Client's name and address]

Dear Client:

Congratulations! Your offer was accepted! It requires a team effort to get to closing, so I have enclosed an overview of what to expect between now and then. It is very important, so please review it carefully.

Important Dates to Remember:

- Effective Date \_\_\_\_\_
- Inspection Deadline \_\_\_\_\_
- Inspection Response \_\_\_\_\_
- Closing Date \_\_\_\_\_
- Loan Application Deadline \_\_\_\_\_
- Loan Commitment Due \_\_\_\_\_
- Condo Status Certificate \_\_\_\_\_

Reaching a successful closing requires paying attention to an incredible number of details. The [closing company] will work closely with you now to make sure all details are handled.

As always, my goal is to have a smooth closing process and to relieve you of any unnecessary stress. Please feel free to contact me with any questions.

Sincerely,

[Your name]

[Redacted signature]

[Your phone number]

[Your email address]



## Problem-Solving Guidelines

1. Focus on facts, not emotions—issues, not personalities.
2. Apologize for any error and validate their concern.
3. Own your statements personally—say “I,” not “we” or “they.”
4. Paraphrase the concern to make sure you have it right.
5. Ask multiple “whys” to get at the root cause of the issue.
6. Discuss a variety of possible solutions that speak to the root cause.
7. Once you have agreement on the solution, move fast to implement it.
8. Build any lessons learned into your business for the future.



## Client Satisfaction Survey

To:

From:

We worked together on a project of utmost importance to you—the sale of your home. Please help me serve you and your friends better by taking a few minutes to complete this survey. If you wish to talk to me directly, don't hesitate to call me at \_\_\_\_\_. For your convenience, I am enclosing an addressed and stamped envelope.

Directions: Please rate your level of agreement with these statements: 1 = Strongly Disagree, 10 = Strongly Agree.	☹					☺				
	1	2	3	4	5	6	7	8	9	10
1. I delivered on what I promised.										
2. I was accessible when you contacted me.										
3. I listened.										
4. You are willing to recommend me to others.										
5. You would use me again if you needed a real estate sales representative.										
6. If you were in charge of my business, what's one thing you'd change?										
7. What did I do well?										
8. May I include your comments in my marketing materials? <input type="checkbox"/> Yes <input type="checkbox"/> No										

*Thank you!*