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The Client Journey

Lead → Customer → Client

Was there ever a time when?

You ran that buyer . . .

YIKES ! ! !

"How could this happen ?"

"What do I do now ?"

"How do we fix this ?"

REPRESENTATION



#NAREFFECT

The good news...

When we learn to leverage representation,
we will never feel that pain!

A series of concentric circles in shades of gray, centered on the left side of the slide, creating a ripple effect that fades towards the right.

**Would you take a listing
without an agreement
signed?**

The Client Journey



3-Step Process

3 STEP PROCESS



Set Appointment & Introduce Representation



Explaining the Process & Discovering Dreams



Securing The Signature

STEP 1

Set Appointment & Introduce Representation

Set the Appointment

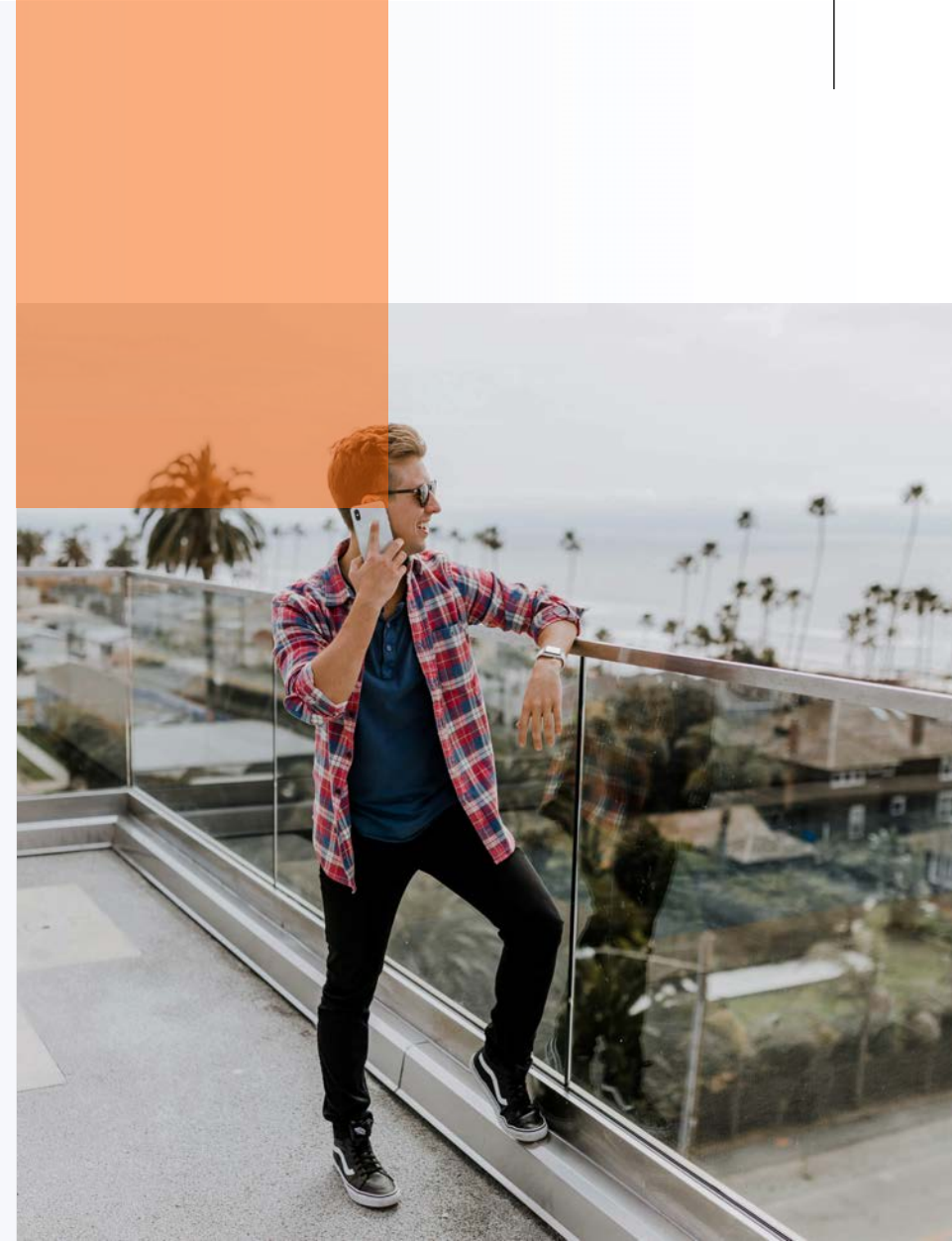
Showing - In Person Consultation - Phone Call - Zoom Meeting

Confirm the Appointment

Showing - In Person Consultation - Phone Call - Zoom Meeting

Introduce Representation

Buyers Agent - Sellers Agent - Dual Agent - Designated Agent



STEP 1

LEAD

What Do We Say . . .

SET THE APPOINTMENT

“Does _____ or _____ work better for you to see the property?”

CONFIRM APPOINTMENT

“ Looking forward to seeing you the property at _____ ”

INTODUCE REPRESENTATION

“ Not sure if anyone has explained how agency works in our state, but it’s critical that before we see the property you understand how we work for you.

I would like to review the process. I can cover everything from the laws – mortgage process – your wants & needs – your timeline so we can build a custom strategy for you.

In essence this will help me bring you properties that meet your goals.

Do you have some time prior to grab a coffee or is it best to have this conversation outside property just before viewing the home?”

REMEMBER!

Real Estate is a relationship business built on trust; the commodity is the house.

Build Trust Upfront

STEP 2

Explaining the Process & Discover Dreams

Define Agency

Buyers Agent - Sellers Agent - Dual Agent - Designated Agent

Explain Why You

Brand - Unique Value Proposition

Ask Great Questions

Wants - Needs - Motivators - Rapport Building



STEP 2

CUSTOMER

What Do We Say . . .

DEFINE AGENCY

“Our state clearly defines agency. When working as a buyer's agent we represent your best interest to get you the right house for the right price.

When working as seller's agent we represent your best interest to get you the highest and best price with terms and conditions that work for you.

In Dual / Designated Agency we represent both the buyer and the seller, and this is how this works... [insert your states regulations]

*** In the event there are additional forms of agency explain after the 3*

EXPLAIN WHY YOU

[This is where you say your UVP – Unique Value Proposition]

ASK GREAT QUESTIONS

Share with me:

- What attracted you to this property?
- Are you looking only in this area?
- Are there specific features that we should be looking for?
- Is there anything we should avoid?

REMEMBER!

We want to do process first (boring stuff) then get the customer dreaming towards the future

STEP 3

Secure the Signature

Recap Journey

Confirm Wants & Needs — Timeline — Process

Sign Representation

Exclusive vs Non-Exclusive — Timeframe — Commitment

Onboard Client

Activation of Client Portal — Follow Up Plan — Next Steps



STEP 3

CLIENT

THE CLIENT JOURNEY

What Do We Say . . .

RECAP JOURNEY

“I feel like I have a clear understanding of what you are looking for (insert 2 -3 of their dream)”

SIGN REPRESENTATION

“ Based on our conversation, are you ready to hire me for the job of finding your home?”

{Secure signature manually or electronically & handle objections}

ONBOARD CLIENT

“ Super excited to get to work for you and start our journey together. Be on the look out for {share your client process} ”

REMEMBER!

Our job is to realize their dream. When people understand representation & process, they will hire you to do your job.



Pulling It All Together

1. Don't overthink the 3 Step Process
2. Guide from Lead > Customer > Client
3. Get to work

The NAR Effect is a good thing.

Thank You!

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