




CREATING A CUSTOMIZED BUYER EXPERIENCE

The System & Materials for Personalizing Every Buyer Consultation

Oriana Shea

 Real Brokerage

 @theorianasheagroup

90%

Agreements Signed
After Buyer Consult!!

At a GLANCE

When you're buying a home with Oriana Shea, it can feel like her entire process has been created specifically for you – because it has. Luckily, Oriana doesn't have to start from scratch every time, because she has a streamlined process beginning with the creation of a buyer profile that makes every interaction special.



**Long Beach,
California**

PRIMARY MARKET



\$1.1m

AVERAGE PRICE POINT



20

YEARS IN REAL ESTATE

Production Stats Over One Year

74

TRANSACTIONS

\$65,000,000

SALES VOLUME

\$1,400,000

GCI

CORE CLIENTELE

Wide range

PRODUCTION

50% | 50%

Buyers | Sellers

TEAM STRUCTURE

✓ **4 agents**
✓ **3 staff members**

Oriana ON COACHING



Coaching has been instrumental in my success and how I've evolved over the years. I've been with TF for almost 12 years now. When I joined, it was in May and I had only closed 4 or 5 deals that year. I ended the year with 24 closed. To say coaching was a game changer for me is putting it mildly. I've learned how to grow and run an actual business. No one tells you that you're running a business when you get into real estate. I've learned to push through barriers and fears. Each of the coaches that I've had over the years have been phenomenal and incredibly collaborative. Tom and coaching have helped me push the limits and achieve so much more than I ever thought possible. I'm incredibly grateful for coaching and for the incredible agents (and now friends) that I've made over the years.

TF

TM



BY THE NUMBERS

50%

Of business is buy side

90%

Of buyers sign agreement upon completion of buyer consultation

\$2-\$2.50

Cost to print buyer book per book

200

Books run at a time

Monthly buyer activity for the team -

11-12

Buyer showings

7-8

Buyer consults

6-7

Buyer agreements signed





THE STORY

Unwavering attention. Boundless creativity. A truly customized experience.

This is what buyers think of when they think of Oriana Shea. This is because every experience is tailored to fit the particular buyer – an outcome that is only possible because of the in-depth buyer profiles Oriana creates. These profiles allow her to not only learn each buyer's needs and preferences but also forge a strong connection and ensure they feel guided every step of the way.

But buyer profiles are just one pillar of her finely tuned system which also encompasses quality materials, comprehensive information, and effective communication. She firmly believes that adhering to this strategic approach is paramount; those who deviate from it are at risk of losing valuable business. In fact, she emphasizes that buyer agents who neglect to implement her approach jeopardize the chance of retaining clients.

Oriana began her career in clothing design but made the switch into real estate when she became disillusioned by the corporate world. While initially daunting, she soon discovered her knack for creative marketing, utilizing her inherent creativity and design prowess to create a marketing and presentation arsenal unmatched in her market. Eager and hardworking, Oriana never allowed bad habits to take root, constantly striving to improve her approach.

For Oriana, it quickly became clear that buyers presented a promising route to financial gain, prompting Oriana to buckle down on Open Houses every weekend. Her own experience of buying a home had been less-than-satisfactory, and she used this experience to inform the one she would deliver to her own clients. Where her own agent had merely shown up at the house without truly understanding her needs, Oriana was determined to create a meaningful and lasting impression. She envisioned a process where buyers were excited, empowered with a voice, and comfortable throughout.



THE STORY

Since this beginning in 2004, she's never stopped refining her approach. When she initially met a buyer, her focus was on clarifying the next steps. This led to the establishment of the buyer consultation, a pivotal phase that she had been conducting even before formally acknowledging its name. When she introduced a buyer agreement, a staggering 90% of clients willingly signed on, proving just how effective her approach had become.

The remarkable outcomes stemming from Oriana's consistent and informative strategy are numerous. Clients not only feel truly heard and informed, but they also gain enhanced confidence in both the real estate process and the offers they make. Moreover, clients often unearth aspects of their desires that they themselves were previously unaware of. Oriana firmly believes that her approach cements her commitment to assisting clients in this significant life milestone.



THE STRATEGY

BUILDING A BUYER PROFILE

- Once contact has been established, send the prospects an intake form as a precursor to the upcoming consultation.
- Already equipped with the buyer's contact details, Oriana's team is poised to delve into the process of uncovering and discovering critical details about the buyer's needs, preferences, and situation.
- The form is structured to unveil various aspects of the buyer's circumstances, such as whether they have children, if they're currently working with another agent, or if they've already engaged with a lender.
- In addition to the standard information collection, the intake form includes clever touches such as requesting the buyer's birthday.
 - This seemingly small detail provides an excellent opportunity for a thoughtful and effortless gesture – sending a birthday message via text or a quick phone call.
- During the actual consultation, the agent guides the client through the intake form, facilitating a comprehensive understanding of the details provided, allowing for a heightened sense of customization in the process.
- By leveraging the information acquired through the intake form, Oriana and her team lay the foundation for a more meaningful and effective buyer consultation.

PRE-QUALIFYING THE BUYER

- Rather than directly delving into financial inquiries, approach sensitive topics gently.
 - Once a consultation appointment is scheduled, Oriana skillfully broaches the subject by inquiring whether the client is currently working with a lender.
 - She smoothly transitions into asking if they've obtained pre-approval, taking the time to clarify the distinction between being pre-qualified and pre-approved.
- The intention is always to guide the client towards a reputable lender.
- This stage is also the ideal place for setting and confirming expectations regarding budget.



THE STRATEGY

- To streamline the process, Oriana takes the initiative to have the lender reach out to the client.
 - By orchestrating this connection, Oriana queues up the interaction, allowing the lender to provide feedback on the buyer's financial readiness.
 - If the buyer doesn't appear ready to act now, Oriana is then able to adjust her approach for the consultation.

AT THE CONSULTATION

- Agents come prepared with a homebuyer packet.
 - This is a tangible resource that introduces the buyer to the buying process and outlines the team's role in guiding them along the way.
 - The packet explains the significance of having a realtor and provides a wealth of information every buyer should be acquainted with prior to making a purchase.
- Oriana always asks the question, "Has anyone walked you through this process before?"
 - The answer is almost always "no," which allows her to demonstrate the value of having a buyers' agent, as well as fill in the gaps in their understanding and further discern their specific needs.
- Set clear expectations when discussing markets, timelines, and pricing or budget considerations.
- Oriana is very open about her team's successes, sharing their strategies for winning homes in situations involving multiple offers.
- Beyond the intake form, Oriana and her team also use a buyer preference sheet (later added into their profile) which allows them to extract vital information that will shape the course of their collaboration.

IT'S ALL ABOUT THE MATERIALS

- Oriana is well known for her arsenal of meticulously crafted marketing and presentation materials.
- The homebuyer packet is a cornerstone of her consultation process which serves as a comprehensive guide, enlightening buyers about the real estate journey, and outlining the team's fundamental role in it.



THE STRATEGY

- When her agents participate in Open Houses, they are armed with a well-rounded packet containing the homebuyer packet, a notepad, and bios of the team's buyer agents.
- Oriana also equips her agents with a high-quality buyer book for appointments.
 - This buyer book not only boasts pertinent information but also includes a designated space for the agent's business card – emphasizing the need for personal representation.
 - Within the book, two critical pages stand out:
 - The "How We Work for Our Buyers" page succinctly illustrates the extensive services provided to buyers. This is particularly useful in discussions about compensation.
 - The "Our Professional Relationship" section covers key aspects of the buying process and serves as an ongoing reference for clients even after the transaction is complete.
 - The book also has a dedicated space for clients to take notes, fostering engagement in the process.

SETTING BOUNDARIES WITH CLIENTS

- Set clear expectations right from the outset.
- Share work habits, including days off and designated times for unplugging.
 - Oriana has adopted a practice of not responding to emails on weekends, preferring clients to communicate via text during those times.
 - Sundays are her days off.
 - Oriana says something similar to this: "I usually put my phone down or on silent at 7:00 p.m. If you think we're going to need to have a conversation at night, tell me, shoot me a text, and I'll keep my phone on hand." This method respects both her boundaries and her clients' needs.
- Early in her career, Oriana felt apprehensive about informing clients about her time away from work, but have found that clients are most receptive to transparency. Setting these boundaries is not only acceptable but essential.

Oriana's 3 Action Items **FOR SUCCESS**

1

Dive into buyers! Be creative in the property with clients. Give them ideas on how to make it their own.

2

Treat buyers like future sellers. Build the relationship and deliver great service. It's not about selling/buying houses; it's about cementing a relationship.

3

Train yourself and your agents on how to tell clients if something is not a right fit for them. They will respect you and be lifelong advocates.

6 Things Oriana Will Do **MOVING FORWARD**

1

Continue weekly team masterminds to discuss the buyer objections and concerns.

2

Continue to innovate the buyer preferences sheet.

3

Develop new ways to make lifelong advocates of her business.

4

Continue to train the team on sales and negotiation tactics.

5

Continue to find creative outputs through the development of the buyer experience.

6

Work with her Tom Ferry coach to help keep her accountable and implement these ideas!

Oriana's TOOLKIT

Buyer Consultation Process Outline

A full overview of The Oriana Shea Group's process for buyer consultation.

3 Reasons Why You Should Do A Buyer Consultation

Example of Oriana's YouTube video on why agents should do a buyer consultation.

Buyer Packet

Example of The Oriana Shea Group's 2023 Buyer Packet.

Buyer Preferences Sheet

Example of Oriana's buyer preferences and intake sheet.

Buyer Book Example

Complete example of The Oriana Shea Group's Buyer Book

Outline For The Buyer Consultation:

SCHEDULE THE APPOINTMENT AND CALL TO CONFIRM THE DAY BEFORE – Explain that in order for you to better serve them you need to better understand their goals and what's important to them, so sitting down and meeting for 30 minutes is your "needs discovery analysis". (You are already starting to create value in their minds)

PRE-SCREEN YOUR BUYERS BEFORE YOU MEET WITH THEM – Once you have the buyer consultation booked you should ask if they have met with a lender yet and if not then recommend a lender to them. If they have someone they want to work with ask for that lender's contact information so you can introduce yourself. You'll want to screen the lender to see if it's someone that is going to perform during the transaction or cause problems. Take control of the situation now and let them know that you will have your lender call them to start going over their options with them. (You will be better prepared for your buyer consult if they have spoken with the lender first)

CREATE YOUR BUYER BOOKLET OR FOLDER: This will allow them to understand how much goes on during the process and why they need you. There are a lot of moving parts that you are there to help them navigate through.

YOUR BUYER CONSULT:

- Thank them for coming in and reiterate how excited you are to help them. Make them feel comfortable, offer them something to drink. Start to create rapport.
- Begin the needs analysis (the Buyer Preference Sheet will walk you through the questions).
- Set the expectations:
 - o There is no such thing as the perfect dream home. We need to find the four walls that meet most of your needs in the best possible location that you will turn into **YOUR** dream home. All the homes we will be looking at are someone else's dream home with their personal stamp. Does that make sense? (Create realistic expectations).
 - o Walk through the questions on the needs analysis form and dig deeper on what they want and if it's attainable. (Tell me more about why 3 bedrooms are important to you?)
 - o When finished completing the needs analysis form explain that now you have enough information to create their custom search, which you will

be monitoring and that you will begin previewing homes from their search for them. (Explain that you preview a lot of homes each week for your buyers and you network with a lot of agents and often know about homes before they even hit the market. Everyone wants the inside scoop on off market listings.)

- o Proceed to the "Buyer Book". Give a quick introduction; move through the first few pages and go over the transaction process, explain what happens and flip through the pages of the book (you are building up to the buyer agreement).
- o Flip to the copy of the RPA that is in your buyer book and explain to them that this is the contract that they are going to be completing when the time comes. Reassure them that you are going to walk them through this every step of the way. (It's in the book to show them how important it is for them have a pro. Explain how important it is to properly complete this contract on their behalf and that there are lots of agents who miss checking critical boxes that can put the buyer at risk.
- o Talk about our "Winning Offer Package". What we do to ensure our buyers offers stand out when we are competing. Many of our buyers are winning in multiple offers with lower offers and in some cases with contingencies to sell a home. Wouldn't you like to have a winning presentation for your offer?
- o NOW go back to the "**How We Work For Our Buyers**" page and go through once again everything that you will be doing for them behind the scenes. Coach them on how to go into open houses if you absolutely can't be there with them. Coach them on how to send you addresses of homes they drove past so they don't call the sign. Review all of the steps and timelines that you manage once we are in escrow. You are building credibility and value.
- o Move to **Our Professional Relationship** page. Ask them if they understand how we are compensated. Most buyers don't know. Proceed in explaining how and when we get paid for our time and services. Everything you have just described that you are going to be doing to help them throughout this process. You are committing a lot of valuable time that is devoted to helping them. The only thing you ask is that you have an agreement that they are going to allow you to represent them when the time comes whether they found the home or you did. Does that sound fair? (They almost NEVER say no. **try nodding your head up and down when you ask this question and look them in the eyes.**) "Great, let's get the paperwork out of the way, so we can get started. If there is hesitation: Try asking what's holding them back.

- "Our office requires that we have an agreement much the same as you would if you were going to list your home for sale" Mention that we include an "Easy Out Clause" with our buyer agreement because we don't want anyone to feel held hostage to a contract. However, we can't devote the amount of time needed to do this job for them without an agreement. We only commit to working with a certain number of buyers at any given time to ensure that our buyer receive a higher level of service. DON'T OVER THINK THIS! Just put the paper in front of them with a pen like this is the natural next step then move on.
- Discuss the things that they need to do their due diligence on (narrowing down neighborhoods, evaluating schools etc.) and recommend they drive by the properties to check out the location.
- Review the section on Working with Home Builders and why this is so important.

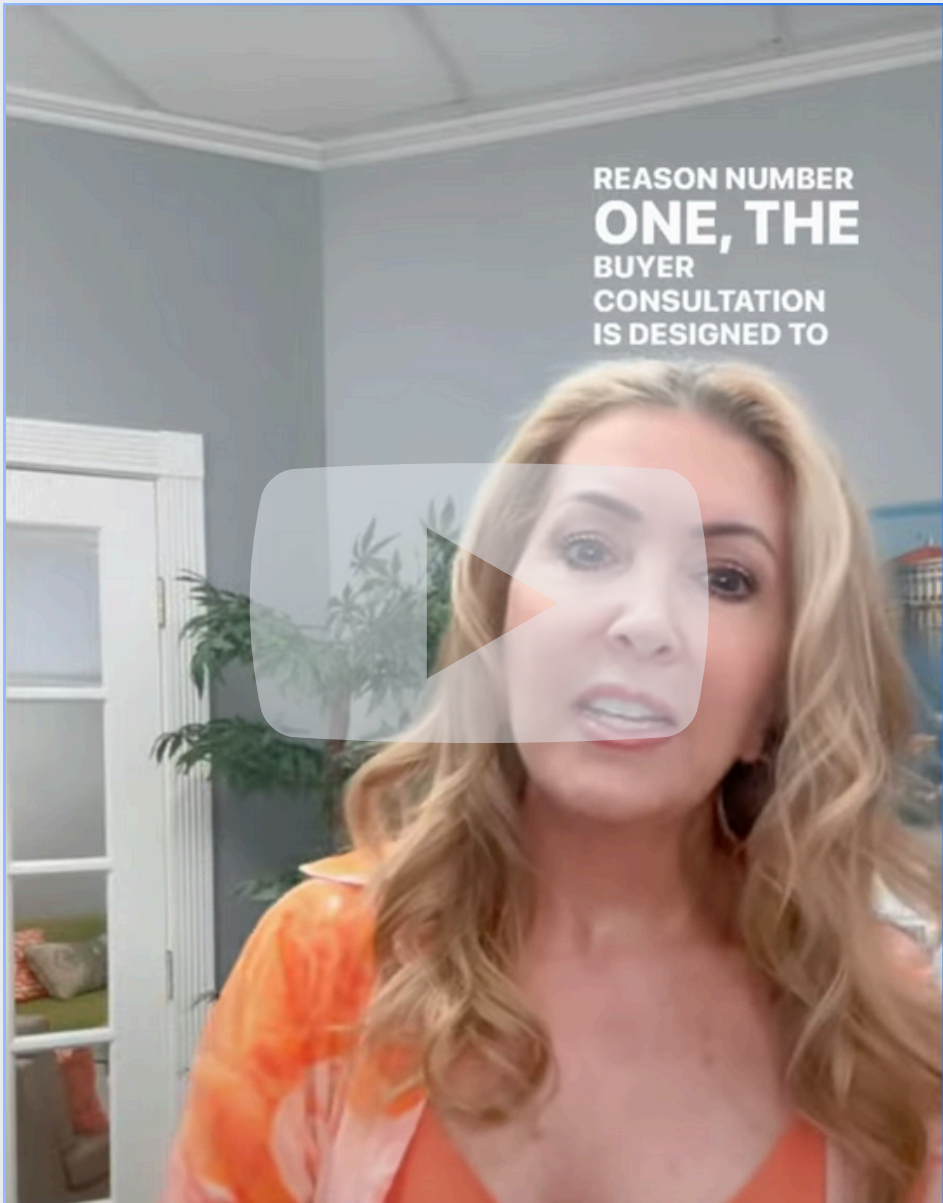
Congratulate them on taking the first step! Now get to work and find them a home!

The Oriana Shea Group | Real Brokerage

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[Tap above to go to YouTube video.](#)



Note from your Realtor

Congratulations on Taking The First Step!

Enclosed is an introduction to the home buying process.

You are about to embark on the exciting journey of finding your new home. Whether it is your first home or your tenth home, a retirement home, or an investment property, we will make your home-buying experience fun and exciting. We can help you find the ideal home with the least amount of hassle, and we are devoted to using our expertise and the full resources of our office to achieve these results!

Purchasing a home is a very important decision and a big undertaking in your life. In fact, most people only choose a few homes in their lifetime. My team and I are going to make sure that you are well equipped and armed with up-to-date information for your big decision. We are well prepared to guide you through every phase of the home-buying process.

So let's take an exciting journey together! We look forward to meeting your real estate needs every step of the way!

Oriana Shea

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WHAT OTHERS ARE SAYING . . .

"I can honestly say that Oriana and her wonderful team made buying our first home a great experience! All of the help they provide is amazing and they truly care about you. We felt like they went above and beyond to make the process seamless by meeting with us at odd hours due to our complex schedules. Do yourself a favor and let Oriana and her team find you the home that you deserve!" -John H.

THE
ORIANASHEA
GROUP

. . . Because who you work with matters.
Now more than ever!



Contact us:
oriana-shea.com
562.270-1775

C F I

Coaching Clients, login to Revii to view Oriana's full Buyer Packet!

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Buyer's Profile / Intake Sheet

Today's Date _____

Buyer's Name _____ Buyer's Name _____

Current Address _____ City _____

State _____ Zip _____ Home Phone _____

His Work Phone _____ Her Work Phone _____

His Cell Phone _____ Her Cell Phone _____

E-mail Addresses _____

His/Her birthday (day / month) _____ His/Her Birthday _____

How many people are in your family? _____

Children's Names, Ages and Birthdays _____

How did you come to call on me? _____

Do you or any family member have a real estate license? _____ Working with any other brokers currently? _____

How long have you been looking? _____

Do you currently own or rent? _____ If you rent, when is your lease up? _____

If you own, must you sell before buying? _____ Is it currently listed? _____

Where is your home and what is your estimate of it's value? _____ \$

What do you like most about your present home? _____

What do you like least about your current home? _____

Hobbies or special interests: _____

Do you have pets? _____ What type of pets? _____

When would you like to be moved into your new home? _____

What price range are you considering? _____

What kind of home would you like? _____

Number of bedrooms? _____ # of Bathrooms? _____ Square Feet or Approx. Size? _____

Stories _____ Lot Size _____ Pool / Spa _____ Fireplace _____

School district _____ Transportation Needs _____

What area(s) or neighborhood(s) do you prefer? _____

What other requirements do you have? _____

Is there anyone else who will be helping you make the buying decision? _____

What is your occupation? _____

Do you have a lender? _____ Lender's Name: _____ Company: _____

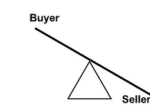
Lender's Direct Phone: _____ Lender's Email: _____

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YOUR HOME BUYING GUIDE

UNDERSTANDING AGENCY... Who Works for Whom?



SELLER AGENCY (SINGLE AGENCY)

- Agent will represent the best interests of the seller
- Agent will owe the seller fiduciary duties
- Agent must give the buyer all material facts so that the buyer can make an educated decision



BUYER AGENCY (SINGLE AGENCY)

- Agent will represent the best interests of the buyer
- Agent will owe the buyer fiduciary duties
- Agent must give the seller all material facts so that the seller can make an educated decision



TRANSACTION BROKER (DUAL AGENCY)

- Agent represents both the buyer and the seller equally
- Agent's objective is to get a mutually satisfactory agreement among all parties
- Agent gives all options to the buyer and the seller
- Depending on the local market, all parties may be present at contract presentation to negotiate on their own behalf
- All parties have confidentiality. Agent may do nothing to the detriment of either the buyer or the seller
- Both the buyer and the seller have a right to counsel. Before making any decisions, both parties have the right to seek family, religious, legal, or financial counsel.

In all relationships, as your agent I have a duty to act honestly with both the buyer and the seller.

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THE NEIGHBORHOOD

There are many factors to consider when selecting a neighborhood that is right for you. Below are just a few of the many factors -- You may think of others that are important to you. Please write them on your Home Search Criteria form so they do not get forgotten.

Neighborhoods have characteristic personalities designed to best suit single people, growing families, two-career couples, or retirees. Investigate to determine if the neighborhood matches your lifestyle and personality.

Scout out the Neighborhood!



It is important that you scout the neighborhood in person. You live in more than your house.

- Talk to people who live there.
- Drive through the entire area at different times of the day, during the week and on weekends.
- Look carefully at how well other homes in the area are being maintained; are they painted, are the yards well cared for; are parked cars in good condition, etc.

Neighborhood Factors to Consider:

- Look for things like access to major thoroughfares, highways, and shopping.
- Listen for noise created by commerce, roads, railways, public areas, schools, etc.
- Smell the air for adjacent commerce or agriculture.
- Check with local civic, police, fire, and school officials to find information about the area.
- Research things like soil and water.
- Look at traffic patterns around the area during different times of the day and drive from the area to work.
- Is the neighborhood near parks, churches, recreation centers, shopping, theaters, restaurants, public transportation, schools, etc.?
- Does the neighborhood belong to a Homeowner's Association?

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LET'S ADHERE TO "THE PLAN"

A successful real estate transaction hinges on numerous details involving deadlines that must be met so that you can move into your ideal home as soon as possible.

TO DO:

- ✓ Loan Application: (Application fee is due at this time).
- ✓ Seller's Disclosure must be signed:
- ✓ Set inspection date and time:
- ✓ Written notice due -- all items from the inspection that you wish to be repaired:
- ✓ Negotiation of inspection repair items complete:
- ✓ Title Commitment due:
- ✓ Insurance: (You are required to arrange for insurance coverage and to inform your mortgage company of your agent's name and phone number).
- ✓ Loan approval:
- ✓ Closing Date:

DATE COMPLETED:

**** Please note:** During the loan and home-buying process, you will be asked to supply documentation, respond to phone calls requesting information, schedule dates into your calendar, etc... It is very important to respond to requests for information right away or it can cause delays in the loan approval process, putting your escrow at risk.

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Coaching Clients, login to Revii to view Oriana's full Buyer Book!