DELIVER A WORLD-CLASS EXPERIENCE

Client Experience Timeline

ABOVE THE LINE
Above the *Client Experience Timeline*, focus on where the client is in the process.

STAGE 1
Pre-Appointment

You've set an appointment with a client for an Initial Consultation. Most people are inexperienced in real estate/lending transactions and your client may approach the appointment feeling nervous, anxious, even intimidated.

STAGE 2
Initial Consultation

Use the Initial Consultation Dialogues to tell your client how you work and find out what's important to them. After choosing to work with you, reinforce that they made the right choice.

STAGE 3
Finding

Your client is waiting for people to preview their home, or is actively searching for a home, or is determining which loan program is best for them. During the "finding" stage your client experiences the inevitable turbulence that's part of every transaction.

STAGE 4
Negotiating Agreements

You and your client are sorting through potential offers and outlining terms for taking the next step. You're addressing different obstacles in the transaction that could cost your client hundreds (if not thousands) of dollars, and even cause the entire transaction to unravel.

STAGE 5
Remove Conditions

Your client has made a decision and you're in the process of overseeing the many transactional details. You offer referrals and helpful information relevant to the client's moving or financial needs.

STAGE 6
Celebration

Assure your client that you value this relationship beyond the end of the transaction by attending the closing and doing something special to celebrate.

STAGE 7
30-60-90 Day Transition

Show your client that you understand what they're experiencing at different times following their transaction by continuing to provide value at the 30-day, 60-day, and 90-day mark.

BELOW THE LINE
Below the *Client Experience Timeline*, focus on using touchpoint systems to exceed client expectations.

Touchpoint 1 | *Touchpoint 2* | *Touchpoint 3* | *Touchpoint 4* | *Touchpoint 5* | *Touchpoint 6* | *Touchpoint 7*

Go Green!

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