



This Course Will Include:

- Expectations of:
 - ✓ Cartus
 - ✓ The Client
 - ✓ The Customer/Transferee
- The customer experience and the challenges of a relocating customer
- Various Move types
- The home buying process and service tips
- Agent Requirements

Welcome Home

Client Expectations

Clients want their employee/transferee to experience a smooth, stress-free relocation so that they can be as productive as possible in their new job during and after the relocation

An Effective Agent is:

- Knowledgeable
 - Market, community, schools, recreation
- Available
 - From initiation to home finding trip through closing
- Flexible
- Communicative
- Responsive
- Follow up
- An advocate

Customer Expectations

Great Impressions

- Show up when needed and on time
 - With a clean, fueled up car
 - Know where you are going
 - Pay attention to the customer (not your cell phone)
- Understand needs
- Honor commitments
- Show properties tailored to your customer's parameters
- Represent their best interests
- Understand the market
- Know the homes they are showing



4

Cartus Agent Requirements

Full-time with minimum of 2 years experience in market and at least 10 closed transactions in the past 12 months.

Submit to and pass a background check with the Cartus provider and OFAC compliance

Successful completion of required training

Attendance at client specific training

Must accept all referrals regardless of price range

Meet or exceed service expectations

Never discuss referral fees or re-refer a customer

Conversion of Incoming Buyer referrals

5

Goal Performance=Conversion=Revenue

CARTUS

- This increases the ability of Cartus to retain existing clients and sign new corporate clients

Brokers

- Increased market share and opportunity for increased referral volume from Cartus

Agents

- Success drives spin off business

Conversion



- Increases Revenue
- Enhances Reputation
- Increases sphere of influence
- Increased spin off business
- Create a customer for life

6

Relocating Customers are offered different Policies and Benefits

Home sale

- Buyout Program
- Mandatory listing
- Status of existing home

In addition to the sale of their old home and new home purchase, keep in mind the following benefits that may impact customer timelines.

House hunting trips

- Number/length
- Spouse & Children
- Combined with business at the new location

Is Temporary housing offered

Household Goods Movement

- Delivery time
- Storage In Transit



Various Types of Moves

Relocation – related to a client sponsored move and/or job change.



Other Programs:

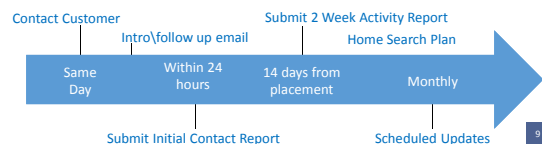
Broker to Broker – referred by another Network member.

Affinity – associated with a member program.

Timelines and Deadlines

FIRST 30 DAYS

- Get in touch right away *(first impressions)*
- Educate customer on purchase requirements/process in the new location
- Establish communication protocol *(type and frequency)*.
- Keep notes and follow up with Relocation Department & Cartus
- Be authentic and sincere



The First Call

The Introduction Call should establish the foundation for what will be a long-term relationship.

- ✓ Introductions
- ✓ Exchange Contact information
- ✓ Confirm Information you have
- ✓ Gather Information you don't
- ✓ Have a Checklist
- ✓ Ask Questions & Take Notes

- ✓ Determine Timeline **(theirs)**
 - New Job start date
 - Status of departure listing
 - Scheduled house hunting or business trips
- ✓ Set follow up schedule
- ✓ Follow up with Information
 - ✓ On services you will provide
 - ✓ The market
 - ✓ Home buying

Listen
Listen, respond
Listen, respond, act
Listen, respond, act, follow-up
Listen, respond, act, follow-up, follow-through
and
LISTEN AGAIN

10

The First eMail

Establish Trust – Send an Intro/Follow up email within 24 hours. Document the information shared during the first call.

- ✓ Demonstrate you listened
- ✓ Recap your intro call
 - Define what services you will provide
 - Confirm market(s) of interest
 - Document next steps
- ✓ Provide area information requested
 - School information
 - Online destination area package
 - Properties meeting their criteria
- ✓ Exchange Contact info

- ✓ Confirm plans for home finding trip(s)
 - ✓ Dates
 - ✓ Transportation
 - ✓ Availability or schedule conflicts
- ✓ Congratulate and Welcome customer



11

Education is Key

- ❖ Explain State and area real estate laws, processes, taxes and fees
- ❖ Share local customs regarding negotiation, inspections, title and closing processes
- ❖ Clarify differences in new home/resale processes, costs, timing
- ❖ Provide a glossary of local colloquialisms and terms
- ❖ Urban vs. Suburban living
- ❖ Share information on current market pricing for buyers and renters as well as multiple offer and negotiation trends.




Be an Advocate for your Customer

Listen, respond, act, follow-up, follow-through

What is their communication preference?

How often do they want to hear from you

- ✓ Be prompt, rather, be early to appointments
- ✓ Clean Car, fully fueled
- ✓ Know your route
- ✓ Understand needs
- ✓ Show properties tailored to your customer's parameters
- ✓ Explain if you deviate
- ✓ Honor commitments
- ✓ Represent their best interest
- ✓ Understand the market
- ✓ Know the homes you are showing
- ✓ Set expectations about the representation you are providing



13

Timelines and Deadlines

HOUSE HUNTING TRIPS

Prior to Arrival	During Trip	After Trip
Confirm <ul style="list-style-type: none"> Schedule Contact Info (including Hotel) Attendees Homes to view Email Addtl Info (if requested) Special needs 	<ul style="list-style-type: none"> Be prompt for meetings Have a clean car Know where you are going MLS copies on homes to be viewed Listen to feedback and adjust plans 	<ul style="list-style-type: none"> Send thank you note Recap Report <ul style="list-style-type: none"> Customer Relocation Department Cartus Referring Agent (b2b) <p>Follow up on requests and provide any additional listings that may match interest expressed.</p>

Trip Planned	Clean/fuel car	Keep up with status of properties before going to them!
Prior to Arrival	Within 24 hours	During Trip
Confirm with Customer	Go over route	Listen to customer feedback
		Recap

After Trip


If customer wants to look outside your service area, contact your Relo Dept.

14

Always Update the Relocation Department and Cartus

Key things to include in updates:

- ✓ Date of last communication
- ✓ Previous or upcoming home finding trips
- ✓ Number of listings shown
- ✓ Customer's demeanor
 - ✓ Need to sell current home before purchasing
 - ✓ Relocation policy related questions (refer to Cartus Consultant)
 - ✓ Perception of the new area
- ✓ Changes in customers need or status
- ✓ Number of offers made
- ✓ Status of offers
- ✓ Status of financing and closing





15

Service Tip

Offer to review the customer's current home listing.

1. Gain a better understanding of customer.
 - ❖ Style
 - ❖ Needs
2. Check out additional homes in departure market as well. Gives perspective.
3. Ask questions about their listing that may help them sell but do **not** criticize.
4. Ask about when\why they purchased and favorite features.

Inquire about any lifestyle changes that may impact what they will be looking for in their new home. Find out what's important to them based upon where they came from.

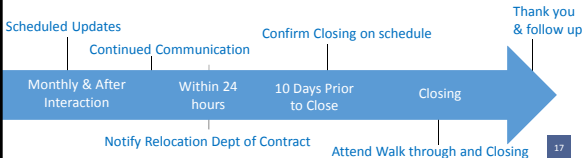



16

Timelines and Deadlines

THROUGHOUT THE PROCESS

- Monthly updates to Relocation Department.
- Assist customer with offer and inspection processes.
- Notify Relocation Department within 24 hours of pending sale.
- The two weeks prior to close can be crucial. Keep in touch with customer, Relocation Department and Cartus to ensure all are aware of any needs and status.
- Attend Walk through with customer.
- Attend closing and notify Relocation Department of final sale.
- Make personal contact with customer one week after close.
- Send thank you letter.



17

The Offer


Remember You Represent the Buyer

- It is crucial that you assist the customer in making a good purchase
- Lender prequalification
- Thoroughly review the contract, disclosures and all the paperwork that is a part of the offer process
- Discuss offer pricing, repairs, credits all financial aspects of the contract
- Educate the customer on contract due dates
- Educate the customer on the closing process and fees and stay on top of the closing date
- Attend the walk through with your customer-be their advocate If an amendment is necessary for last minute items
- Attend the closing with your customer
- Contact your relocation department the day the transaction closes

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18

INSPECTIONS and FINANCING



Guide Customer through process

- Review all inspection reports
- Educate on Issues Identified
- Help develop list, seller notification and concession requests




Contact your Relocation Department for information and other materials you can use.

19

Guaranteed Rate Affinity

About Guaranteed Rate Affinity

- Mortgage origination partnership between Realogy and Guaranteed Rate founded in 2017
- Service Offering
 - Originate and market our services to Realogy's real estate brokerage and relocation subsidiaries, NRT and Cartus
 - Corporate relocation has unique processes and rules. Some Corporate clients have a specific relationship with Guaranteed Rate Affinity and relocating customer must utilize Guaranteed Rate Affinity to receive some of their relocation benefits.
 - Always ask your Cartus Consultant if the transferee you are working with is a Corporate client that works with Guaranteed Rate Affinity or has a relationship with a specific mortgage company

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20

Keep up on things


Set it.....but DON'T forget it

- Add a human touch
- Update your content
- Share learning

This was a JOKE. I cannot say enough bad about how this agent handled my move. She kept sending me blast emails on houses that I had said no to in the past. NO personal service, Only had a few of the houses I wanted to see on my house finding trip (not all of them) that I found myself by looking on websites NO PERSONAL TOUCH WHATSOEVER.


Our agent was not very responsive, often not available, and we ended up finding all properties we were interested in through our own search efforts.

The real estate agent that was provided to me was HORRIBLE!! She treated me as if I was a bother to her to show me houses to purchase, which I thought was her job?? She was no value assisting with the areas and would not provide any information other than search it on the internet .



21

Top Ten Service Issues



1. "My agent contacted me once and I never heard from them again."
2. "My agent set me up on an automatic listing portal and never contacted me again."
3. "My agent kept showing me houses that did not fit my criteria."
4. "My agent did not seem knowledgeable about the area."
5. "I indicated to my agent that text was my preferred method of contact and he kept calling me while I was at work."
6. "My agent acted like they were representing the seller's best interest and not mine."
7. "My agent was not knowledgeable with all types of financing."
8. "I was a first time home buyer and my agent was too busy to really explain all of the necessary information I needed to know."
9. "My agent did not communicate all of the local real estate practices and procedures in the new area."
10. "Lack of availability and inadequate follow-up."

Stay ahead of these common problems

22


The Final Word

Service Goals – Top Block & Exceptional Experience

Would you recommend your agent to a colleague?

Yes No

☐ ☐



Home Purchase Agent

Please tell us more about your experience with AGENT:


Excellent	Good	Fair	Poor
8 7 6 5 4 3 2 1			
Communicated with you in a timely manner			

Service Questions:

- Advocacy
- Cooperation through closing
- Understood needs
- Search
- Consultation
- Knowledge of area
- Property showings
- Overall
- Follow Up
- Customer Service
- Responsiveness

23

Points For Success



- Complete a thorough customer needs analysis-know your buyer
- Review Map and Commute times
- Review current market real estate conditions
- Assist customer in making smart choices for potential resale value in the future
- Assist in negotiations, financing options, inspections, etc.
- Do not accept a referral for an area where you are not 100% familiar
- Do not discuss referral fees
- Alert relocation immediately with any issues
- Follow up, Follow up, Follow up
- Update Relocation as instructed
- Follow up with customer 1 week after closing to confirm move went well and they are adjusting to their new home
- Provide Exceptional Service

24