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### Our Clients Employees Are Their #1 Asset

This course will include:

- Expectations of:
  - ✓ Cartus
  - ✓ The Client
  - ✓ The Customer
- The customer experience including challenges a relocating customer faces
- Various Move types
- The home buying process and service tips

Welcome Home

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### Client Expectations



Our clients want their transferee to experience a smooth, stress-free relocation so that they can be as productive as possible during and after the relocation

**Effective Agent**

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

**Productive Employee**

- Efficient Search
- Work\Life Balance
- Smart Purchase

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### Agent Requirements

1. Full-time with minimum of 2 years experience in market and at least 10 closed transactions in the past 12 months.
2. Submit to and pass a background check & OFAC compliance
3. Successful completion of required training
4. Attendance at client specific training
5. Must accept all referrals regardless of price range
6. Meet or exceed service expectations
7. Never discuss referral fees or re-refer a customer

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### Goal Performance

**The Rewards for Achievement**

**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

**Service Results**



**Conversion**



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

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### The Customer Experience

**New to the market**

- May need additional info (do not overwhelm)
- Managing move from a distance
- Travel & communication challenges

**Beginning a new job**

- May or may not have new home purchase benefits
- Are they PTC or part of a group move?
- Trying to understand relocation policies and benefits
- Do they receive temporary housing?

**And more**

- Selling in departure location?
- Family needs
- Language, customs and experience level

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## Policies and Benefits

### Home sale

- Buyout Program
- Mandatory listing
- Status?

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 accompany
- Combined with business?

### Temp housing

- How long

### Household Goods

- Delivery time
- Storage In Transit

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## 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.

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## Rental Assistance

Typical programs include:

- ✓ Half day or Full Day tours
- ✓ Lease assistance

Today's renter is tomorrow's buyer!



- Keep in touch
  - Touch base with customer every 90 days
  - Determine level of updates desired and follow that pace
- Contact customer 60 days prior to lease expiration to determine if they would like to purchase.

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## Group Moves



### About


- Involves a large or small group of employees moving from a single or multiple markets.
- Intense focus on employee retention.
- Extended timeline and challenges

Departure location – Increased Listing Competition  
Destination location – Inventory Scarcity




### Information

- Maps (with commutation) and area info.
- Corporate Resource Sites
- Statistics including cost of living comparison.
- Lifestyle  
dining, recreation, education, amenities



### Tours

- Major client investment.
- Groups & demographics.
- Buses and/or accommodations coordinated with Client, Cartus & Relocation Director.
- Educational. Combined with presentations and experts on locale.



### Agent

- Clarify wants & needs.
- Answer questions and notify Cartus/Relo Dept about any concerns or misconceptions.
- Assist customers with specific move needs.

**Remember, you are our Ambassador for the market.**

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## Area Tours

- An area tour is offered by some corporate clients to provide an opportunity for a potential relocating purchaser to tour the new location prior to the acceptance of the relocation offer.
- Area tours are usually 3 to 4 hours and the agent should be prepared to provide:
  - Show/tour houses and neighborhoods
  - School information
  - Shopping, dining, and entertainment information
  - Local, state and property tax information
  - A wide variety of additional information (weather, transportation, etc)
- Some clients will pay a fee for an area tour.
- Some clients will not pay a fee but expect that their employees will be provided the same level of service as a fee based area tour.



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## Candidates

**Candidate (can-di-date)** is defined as any customer that has not yet accepted a transfer, whether a home owner or a renter.

- Some clients will pay a fee for this service, fees vary by client.
- Some clients will not pay a fee but expect that their candidates will be provided the level of service.
- Customer may be interviewing at the new location during this visit.
- The tour should include not only housing options but also a tour of what the community has to offer in the new location.
- Standard half day tour is approximately 3 to 4 hours.
- Standard full day tour is approximately 6-7 hours.



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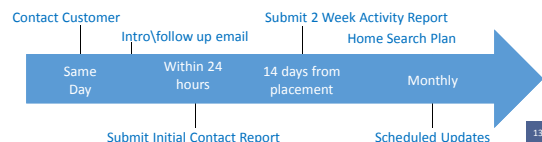
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## Timelines and Deadlines

### FIRST 30 DAYS

- Get in touch right away (*first impressions*)
- Help customer understand 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



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## The Intro Call

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

- ✓ Introductions
- ✓ Exchange Contact info
- ✓ 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
- ✓ Follow up with Information
  - ✓ On services you will provide
  - ✓ The market
  - ✓ Home buying



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## The Intro eMail

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



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## Setting Expectations

### Prevent Culture Shock

- ❖ 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.



**Caution! Don't overload the customer with data!**

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## Know 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



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## Scheduled Updates

**Written scheduled updates sound like a lot of work, but pay off in the long run!**

**Keep your Relocation Department and Cartus in the loop.**

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



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## Service Tip

**Offer to review the customer's old 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.




Checking out additional properties in the departure market and using other tools such as cost of living studies will help you understand your customer.

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## You vs. the Internet

**According to various sources, 82-84% of customers begin their home search online.**

Internet	A Team Agent
<ul style="list-style-type: none"> <li>• Always Available</li> <li>• Volumes of Information</li> <li>• Accurate &amp; Reliable?</li> <li>• Unfocused</li> <li>• Impersonal</li> <li>• Can be overwhelming</li> </ul>	<ul style="list-style-type: none"> <li>• Focused</li> <li>• Responsive and available when needed.</li> <li>• Up to date, reliable information including information not yet available online.</li> <li>• Qualitative, accurate and appropriate to the customer needs.</li> <li>• Understandable, pertinent and supported information backed up by professional answers.</li> </ul>



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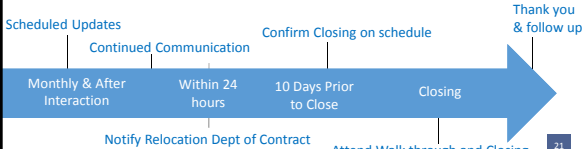
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## Timelines and Deadlines

**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.



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## Timelines and Deadlines

### HOUSE HUNTING TRIPS



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

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

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## Educate

Help your customers develop a check list of things to look for in a home. Assist them with buying right so down road there will not be any resale issues.



**What to look for**

- ✓ New Construction
- ✓ Appliances
- ✓ Location
- ✓ Landscaping
- ✓ Zoning

- Highlight specifics
- Local considerations
- Note features about homes you recommend
- Be honest

Customers will appreciate your assistance and expertise when you help them understand the local market and/or things to look for in a home. It should also speed up the search and help them buy right.

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## 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

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## 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.

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## The Offer

Represent Your Customer

- Stay on top of the closing date and inform your relocation department if there is a delay
- Attend the walk through with the customer-be their advocate if an amendment needs to be completed at this time
- Attend the closing with your customer
- Contact your relocation department the day the transaction closes

2018 Cartus Broker Network

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## INSPECTIONS and FINANCING



Guide Customer through process

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

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

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## Guaranteed Rate Affinity

### About Guaranteed Rate Affinity

- Mortgage origination partnership between Realegy and Guaranteed Rate founded in 2017
- Service Offering
  - Originate and market our services to Realegy'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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## Challenges




- Reaching multi-generational, multi-cultural buyers with a single presentation.
- Presenting statistics that paint a true picture of the micro markets and not just the macro.
- Group Moves often involve long term relationships with transferees beginning communication well in advance of their moves.
- Stress levels of the employee who anxiously watches the shifting market (inventory and pricing) prior to actually being able to purchase.
- The scheduling of an agent's time over an extended decision making, touring and home purchase timeline.

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## 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 .



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## 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



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Thank you for your time, commitment and dedication you have shown toward delivering service excellence to Cartus, our Corporate clients and customers!!



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