



SEVEN STEPS TO A TAKEN

1. INITIAL CALL (CALL #1)

This can mean calling on a Virtual Assistant lead sheet, or calling on a seller yourself for the first touch. In this initial step you are going to need a couple things:

1. Property Information Lead Sheet (either filled out by a VA or blank if you are making first touch)
2. The appropriate script for the lead source (Fsb, Expired, Vacant, FRBO)
3. Commonly Asked Questions, and
4. Voicemail Scripts (if unable to reach the seller live)

2. SEND EMAIL

After you have spoken with a seller and they have indicated that they would like more information about you, your company and your options, you will send them out more information. Use the Form Emails to Sellers document to craft an email. Attach two things to the document 1. Seller Cost Comparison Sheet, 2. Sell Doc (we have an example for you to follow and create your own).

3. FOLLOW UP CALL/SET APPOINTMENT (CALL #2)

Call back the seller at the time you confirmed with them in Initial Call. In this step you will need 1. Filled out Property Information Lead Sheet, 2. Follow Up Call Script, and 3. Commonly Asked Questions. Speak with the seller and if they indicate they would like to take the next step then set an appointment.

4. APPOINTMENT

At the appointment, you are going to need 1. Walkthrough sheet, and 2. Smart Phone or Camera. You are accomplishing 1. Building Rapport with Seller, 2. Seeing the property and taking lots of notes and pictures, 3. Get All Financials including latest copy of the mortgage statement and other expenses and 4. Answering any additional questions. If the seller indicates they want to take the next step keep going.

5. COMPARABLES/ RESEARCH

Once you leave the appointment make sure to drive around the neighborhood or area for 10 plus minutes to get an understanding of the area. Next you will want to complete online research and comparables. You can find comparables on websites such as Realestateabc.com, or Zillow. For Zillow use the tabs to only research properties similar in bed/bath/square footage that have been sold within the last 6 months to a year. Only look at properties that have sold.

6. SEND OPTIONS/ FOLLOW UP

The options that you send will include a purchase price, a monthly payment, a length of the term and additional terms if necessary. These options will be based on three things, 1. The comparables, 2. The Financials, 3. Condition of the Property and 4. The Sellers Motivation. You can send these in a formal email and include 2-4 options.

7. SEND CONTRACT/ FOLLOW UP

Speak with the seller about the options and make small critiques if necessary. Typically a seller will choose one of the options. Once the seller has chosen an option place the all the information including financials and terms into the appropriate contract. You can send these contracts electronically or hard copy. Once the seller has the contracts continue to walk them through it until they are comfortable.

Signed Contract/ TAKEN!