BUYER Client Journey

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Pre-Purchase

Research
Customer researches properties online and offline

Agent Action
- Agent advertises properties for sale across various online and offline channels
- Agent emails property listing to buyers cBase
- Use ActivePipe predictive data analytics that tell you who is ready to transact so you can close more deals and generate leads

Contact & Enquire
Customer contacts relevant agencies and enquires about properties listed for sale

Agent Action
- Agent responds to enquiries in a timely manner
- Agents engaged in conversation to understand buyer needs
- Agent may suggest suitable alternative property recommendations (based on enquiry)
- Offer advice on services from Strategic Investor Group who can assist in prequalifying, guiding the client to become a genuine buyer and control the process to assist the selling agent

OFI
Customer attends open homes to support their research

Agent Action
- Arrive early to all appointments with courteous and professional team
- Greet everyone from front, not inside (if possible)
- Request contact details of everyone attending
- Provide information on home moving services
- Add contact to BusinessBase regardless of external source (Domain, REA) for follow-up
- Have building and pest reports available or direct where to purchase discounted Building & Pest Report with Before You Bid
- Create conversations to determine buyer needs and requirements (e.g. budget constraints, proximity to work and/or public transport, property features, parking, pets, children, reason for moving, where buyer currently lives)
- Provide feedback to seller
- Bring OFI kit

Purchase

Expressions of Interest
Customer decides interest level post OFI

Agent Action
- Follow-up with all OFI attendees

Not Interested
- Agent will continue researching for suitable property and make recommendations (until a match is found)
- Agent builds relationship with prospective buyer

Interested
- Send any relevant reports and documents to buyer
- Respond to buyer questions and queries in a timely manner
- Agent will work with buyer and seller into offer and negotiation stage
- Offer advice on services from Strategic Investor Group who can assist in prequalifying, guiding the client to become a genuine buyer and control the process to assist the selling agent

Offer & Negotiation
Customer in negotiation and has open communication with agent about property price

Agent Action
- Agent acts honestly and transparently between buyer and seller
- Make commitment to achieving the "best possible price"
- Agent facilitates all offers (by auction or private treaty)
- Agent makes an offer on behalf of the buyer (private treaty only)
- Agent negotiates on behalf of the buyer
- Agent communicates openly between buyer and seller during negotiations
- Aim to achieve a fair price and a win-win situation for both buyer and seller

Exchange & Settlement
The exchange and settlement process begins after customer has made offer and seller has accepted

Agent Action
- Offer made and accepted and purchaser agreement signed
- Contract obligations management between buyer, seller, legal and financial teams
- Offer advice on settlement insurance (EBM) and connections offered (Connectnow)
- Offer advice on moving| home services offered. Provide application forms and brochures on services

Conditional

Unconditional
- Agent sends congratulations to buyer and "what happens next" letter
- Settlement date confirmed
- Sold property card distributed
- Sold sticker on signboard
- Payment of funds arranged
- Send out moving tips checklist (unless investor)
- Principal congratulates both buyer and seller
- Send out buyer video (if applicable)
- Access arranged for buyer prior to settlement day for move in preparation
- Agent send congratulations to buyer and "what happens next" letter – include moving home services brochure
- Send out moving tips including mentions of moving home services offered

Post-Purchase

1 Week Before Settlement
- Pre-settlement inspection conducted with pre-settlement checklist
- Agent calls buyer (if moving into property)
- Check in with purchaser and see if they are ready for their settlement in their new home. "Have you organised your connections?"

Settlement Day
- Agent delivers keys and settlement gift to buyer
- Enter buyer into "Customer nurturing program" into CRM
- Send post-sale survey

1 Week After
- Contact buyer "How are they settling in?"

4 Weeks After
- Check in again with buyer and seller "How are they doing?"

12 Weeks After
- Send updated local market report

6 Months After
- Send updated local market report
- Follow-up a week later to see if they found report useful

1 Year After
- Send 1 year anniversary card to both buyer and seller

1 Year & Beyond
- Continue with regular communication via different touch-points (cards, emails, update reports)
- Maintain ongoing relationship for life

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THE POWER OF AN IDEA IS IN ITS IMPLEMENTATION