SELLER Client Journey

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Owner Timeline

MS Pre-Sale

Research
Client enters research mode across all mediums (signboards, newspapers, direct mail, online portals)

Contact
Client establishes contact with agent via multiple channels (email, walk-in, open home)

Appraisal
Client makes notes on agent (timeliness, professionalism, friendliness, knowledge)

MS Sale

Listing
Client makes selection

Marketing
Client decides on marketing campaign and budget

OFI
Client prepares home for inspection

Negotiation
Client in negotiation and expects transparent communication

Exchange & Settlement
Client evaluates and considers all offers presented

1 Week Before Settlement

MS Post-Sale

Settlement Day

1 Week After

4 Weeks After

12 Weeks After

6 Months After

1 Year After

1 Year & Beyond

Agent Action

Pre-Sale

- Use ActivePipe predictive data analytics that tell you who is ready to transact so you can close more deals and generate leads

- Engage and understand seller
- Make a good first impression by listening carefully
- Explore if client is property swapping and if they have an understanding of the selling and buying process and how the financing is a critical piece to get right with Strategic Investment Group – less pressure on Seller and Agent once strategy is constructed

No
- Thank you for opportunity and good luck sent
- Lost listing survey sent

Yes
- Thank you listing letter sent

- Delivery of pre-list kit
- Appraisal of home
- Listing presentation
- CMA report
- Agent offers Seller Beforeyoubid Pre purchase inspection on home

Sale

- Agent calls client to express gratitude in selection
- Listing gift arranged by Client Services
- Listing agreement signed
- Principal calls client with personal thanks
- Agent offera a review of financial needs to better inform the Seller of their options pre and post sale
- Send out seller prepare to sell video or checklist

- Communication and feedback
- Document preparation (solicitor, contracts, finance)
- Advertising, photography, signboards arranged
- Building & Pest Reports prepared and improvements made if required with Before You Bid

- Agent arrives early with courteous professional team
- Bring along OFI kit
- Flowers arranged at first open
- Minimum 2 OFI's/week
- Greet people in front, not inside
- Building and pest reports available direct where to purchase discounted Building & Pest Report
- Have your collateral ready to provide to prospective tenants including moving home service brochures if applicable
- OFI feedback provided to seller with campaign response reports
- Post OFI feedback surveys through ActivePipe to uncover what your customers really think

- Agent acts honestly and transparently between seller and buyer
- Makes commitment to achieving the "best possible price"
- "Fair price" achieved and win-win for seller and buyer

- Offer accepted and sales and purchaser agreement signed
- Contract obligations management

Conditional

Unconditional
- Agent sends congratulations to seller and "what happens next" letter
- Settlement date confirmed
- Sold property cards distributed
- Sold sticker on signboard
- Payment of funds arranged
- Send out moving tips
- Arrange access for buyer prior to settlement day for move in preparation
- Principal congratulates both seller and buyer
- Advise on settlement insurance (EBM) and moving home services (Connectnow)

Seller Off Market

Seller Buying
- Refer to the Buyer Journey for advice on settlement insurance and connections

- Pre-settlement inspection conducted with pre-settlement checklist
- Include in pre-settlement checklist mentions of arranging moving home services.

Post-Sale

- Agent/Client Services delivers keys and settlement gift to buyer
- Enter seller into "Client for Life" program into CRM
- Send postsale survey
- Thank seller with gift for survey completion (optional)

- Contact buyer "How are they settling in?"
- Contact seller "Is everything ok post-sale?"

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

- Send updated local market report

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- Follow-up a week later to see if they found report useful

- Send 1 year anniversary card to both seller and buyer

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

THE POWER OF AN IDEA IS IN IT'S IMPLEMENTATION