

# DIRECT CONNECT



## Direct Connect Outbound Client Script Suggestions

Hi, (DC lead first name). This is (your name) with (your realty). I'm calling to learn more about the details of your home search.

By the way, how did you decide that \*(timeframe) would be a great time to make a move?

Qualify the timeframe as the move-in date or as the startup process.

*\*Use any one of the data points as a springboard.*

## Deep Dive Into the Conversation

MIndset tips from our training team

### Determine Location/Geographical Area

COMFORT VS DISCOMFORT

Create the client's map. Stretch the boundaries to give the client the most exposure. Where do you want to be? "Where do you not want to be?" "Why?" "Why not?"

Continue to probe with "Tell me more" until confident in understanding the limits of the client's desired areas. Take note of the characteristics of each area that appeals or does not appeal to the client. Use these features to circle back to the client when there is a need to remind them of their comfort points.

#### Deeper Dive

Suggest areas not mentioned by clients that may be attractive to the client based on the information the client has shared. "Have you considered (city)?" If the answer is "no," ask "why not?" If the client is sitting on the fence about a particular location, follow with, "If a home came available that checked all the boxes and then some in (locations) would you at least want to hear about them?"





## Determine Budget/Price

### SECURITY VS INSECURITY

Find the comfort zone. Talk about a monthly budget. "Based on your current monthly expenses, what do you see as your house payment?" Quantify the margins, the high and the low, based on the client's desires and affordability. Push the limits. Outline the client's ideal home as they described and ask "If I was able to find you that home, but the price was (above upper limit), would you want me to give you a call and at least tell you about it?" Keep going until they feel their limit is exceeded. Advise them on the low end of the range according to what the market currently offers based on their requirements.

#### Deeper Dive

Advise on current pricing climate and buyer behavior in your market. Set the low end of the client's price range \$1 below their desired number to account for pricing ending in \$ x99,999. "I am going to set your price range at, (for example) \$399,999, even though you told me \$400,000, so we do not miss any homes right at that mark."



## Determine Motivation

### NEEDS VS WANTS

Probe the client's current living style and how that will transform or improve in the client's next move. Define what is necessary, essential, and then what type of scenario will create the lifestyle they are looking for. Listen to their story, acknowledge you are listening, and ask them to tell you more. "Explain that a bit more." "Give me more of an idea of what that is/looks like?" "Tell me more." "Once you have found the home you want, what is it going to do for your future?" Rephrase/mirror back to them for understanding and acknowledgement.

#### Deeper Dive

Reel in expectations. Factor into the conversation there will be homes on the market that may not completely meet the client's criteria, however, they offer bonus features or a sale price the client may value. "By the way, if I hear of a property that falls short of the gold standard, but offers more bang for your buck, say, more square footage, great location, fantastic price, but needs some love and attention, is that something I should call you about?"



## Determine Agent

### YOU VS THE COMPETITION

The possibility of another agent in the picture is real. Approach this without asking the usual, "Do you have an agent?" Instead, inquire about their home search activity to this point. "Tell me about the experience you have had thus far in your home search. "What have you seen?" "What have you liked, and not liked about those homes?" "Who was representing you?" "Did you sign anything, any agreement that you are working exclusively with them?" "I cannot help you until that agreement is complete." "I would not want to put you in a liability situation and upset the other agent."

### Deeper Dive

Reach out to the client again with an inquisitive attitude. "Last time we spoke, you were working with another agent. I am checking in to see if you have found your dream home."

## Determine Mortgage

### FINANCING VS CASH

How did you decide you wanted to finance (pay cash for) your next home?" "What initial questions do you have about the mortgage process?" Inundate the client with examples of what they will encounter along the way. Establish a connection with the client as their advisor.

- ★ Bank vs Mortgage Company
- ★ Mortgage Broker vs Mortgage Rep
- ★ Online Mortgage Companies vs Local to the Area Mortgage Companies
- ★ Conventional vs FHA Loans
- ★ Pre-approved vs Approved
- ★ Down Payments
- ★ Interest Rates
- ★ Prepaid Costs
- ★ Closing Costs
- ★ Reserve of Funds for Tax/Interest/Insurance
- ★ Negotiating Down/Pay Down Mortgage for a Better Rate

*"I know this is a lot of information. What questions do you have?"*

### Deeper Dive

Ask about previous transactions. "What experience have you had in the past with securing a loan?" Did it or did it not meet your expectations?" "What are your current financial expectations for this transaction?"

## Determine Value

### EXPECTATIONS VS PROMISES

Prove your worth without brandishing your resume. Avoid over-promising. Give the client a clear picture of your company, the players, the systems, what can be expected, with examples.

- ★ Outstanding Digital Marketing Team that takes your home search to the highest level
- ★ Outreach/Network with Professional Sphere
- ★ Circle Dialing Owners in Client Desired Neighborhoods

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- ★ Handwritten Letters to Possible Sellers
- ★ MLS Search
- ★ Awareness of Off Market Properties
- ★ Consistent Social Media
- ★ Team Roles - Transaction Coordinator, Social Media Manager, Marketing Director, Operations Manager, etc.

### Deeper Dive

Determine client's personality trait and interact accordingly to achieve positive communication and interaction. Describe to the client your role as well as his/hers/theirs in this transaction.

## Appointment



Assume there will be an appointment at the very beginning of the conversation, before the client answers the phone. Why would they not want to work with you? Confidence should exude in every topic touched upon. This is the reward! No need to stumble through multiple dates and times. Keep it simple. "Would today or tomorrow be better to meet?" "I can have some showings set by then."

### Deeper Dive

Have a follow-up call or next appointment scheduled. Search the client's social media, i.e. LinkedIn, Facebook, Instagram, Twitter, TikTok, Snapchat, Pinterest, YouTube, Reddit. Make note of behavior patterns, preferences, routines, and likings for use in future conversation. The more that is known about the client, the more trust you can build. Find out early on who else will be involved in this transaction. (partner, spouse, family member, kids, pets, etc) Set up a group text to include other decision makers and copy on emails.



**About Ylopo.** Founded by two real estate technology veterans, Ylopo has developed a next generation Complete Digital Marketing and Technology Platform that generates and nurtures high quality home-buyers and sellers for its client base of real estate agents, teams, and brokerages. There are almost 2 million real estate professionals in the U.S. who are prime prospects for our suite of superior products including a proprietary technology that sits on top of Facebook unleashing the most targeted and cost effective lead generation opportunity the real estate industry has ever seen.