

# IGNITE

Elementals 5:

Buyer Constulations

## Notices

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**WARNING!** Real estate agents who violate The Telephone Consumer Protection Act (TCPA) and the National Do Not Call Registry face potentially catastrophic legal damages. Do NOT use or leave artificial or prerecorded messages, and check the National Registry and your internal registry before you dial.

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# Compliance: Do Not Call/Telephone Consumer Protection Act

## WARNING!

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The Telephone Consumer Protection Act regulates calls to cell phones and landlines, auto-dialed calls, prerecorded calls, faxes, and calls to numbers on the Do Not Call Registry. Class-action litigation for TCPA violations is rapidly increasing. Such claims present catastrophic exposure. Consult an attorney for guidance on the TCPA and DNC laws, including consent requirements, autodialer restrictions and prerecorded messages.

### ① Auto Dialers

The TCPA regulates calls and texts to a cellphone using an automatic telephone dialing system (autodialer)

### ① Prior Express Written Consent/ Written Consent

In certain cases, a caller must have prior express consent before making a call. In other cases, prior express written consent is required.

### ① Know the Federal and State Laws

In addition to federal laws, several states have laws governing telemarketing. Talk with your broker about any guidelines and Do Not Call lists your market center may have.

### ① Violations

Recipients of calls that violate the TCPA may recover up to \$1,500 for each violation. Use of an autodialer can rapidly accelerate potential damages.

## DO NOT CALL DO'S AND DON'TS

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Under federal law, sellers and telemarketers may not call individuals listed on the Federal Trade Commission's Do Not Call Registry. Failure to comply with DNC laws could result in substantial government fines and/or civil legal action against you. Consult an attorney regarding compliance with DNC laws.

### ① Subscribe to the Registry

The DNC registry is hosted on a dedicated website. Your Market Center should subscribe to the Registry and give you login credentials. Making ANY telemarketing calls without access to the Registry violates federal law.

### ① Check Before You Call

Before making a call, check to see if the number is on any of these lists: 1. the National Do Not Call Registry; 2. any state Do Not Call list; 3. your internal list. If the number is on any of these lists, delete it.

### ① Honor Consumers' Requests

Never call a number on the Do Not Call Registry. And honor an individual's request to be added to your internal DNC list.

### ① Limited Exceptions

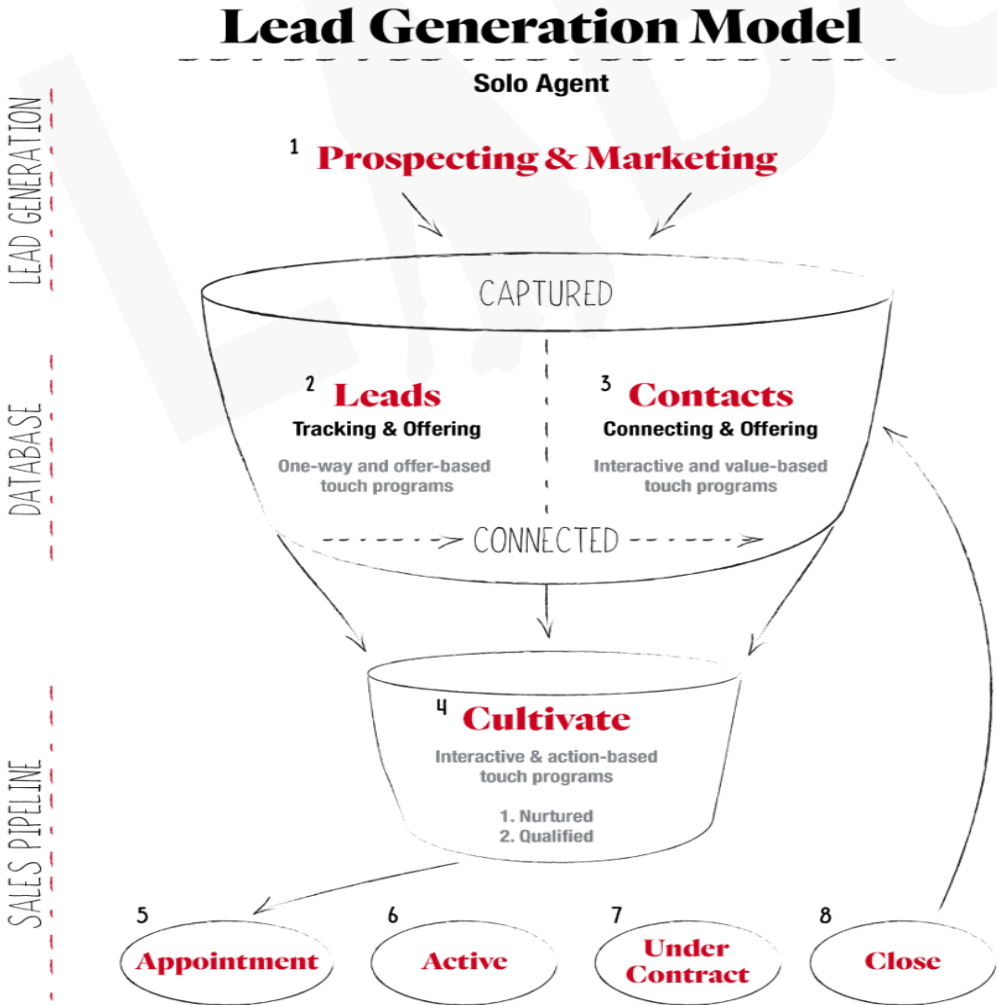
Federal law allows telemarketing calls to be made in very limited circumstances. Contact a lawyer prior to using an exception to ensure it applies.

# Set the Appointment

What are the three objectives of the buyer consultation?

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

Where is the buyer consultation in the Lead Generation Model?



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# Example Buyer Presentation: Your Dream Home

YOUR DREAM HOME

kw

Your needs drive how and when we find your next home. From this day forward, everything I do will be motivated by your goals and how you imagine your life taking place in your new home. Once I get an understanding of where you see yourself, finding your dream home will move quickly, and with minimal interruption to your daily life.

**Visualize your dream scenario for buying your home.**

What's the one thing that has to happen to make that dream scenario a reality?

How can I make that happen for you?

Why is that important to you?

**If we could add just one more thing to make this process even better, what would it be?**

Why is that important to you?



First



# Example Buyer Presentation: Your Preferences

**YOUR PREFERENCES**

kw

# Build your Preference Profile

## The Basics

Have you considered who my main contact will be?

What timeline would you like to strive for?

Have you looked into getting pre-approved for a home loan?

Have you thought about the price range you'd be comfortable with?

If I found a home today that checked all of your boxes, could you see yourself making a move sooner rather than later?

**The what, the when, the how – let's talk about the best way to get in touch.**

**WHAT IS YOUR FAVORITE WAY TO RECEIVE INFORMATION OR UPDATES?**

Select all that apply

Email  
Call  
Text

**WHAT IS THE BEST TIME TO REACH YOU?**

Select all that apply

Morning  
Noon  
Afternoon  
Evening  
Anytime

**AS UPDATES ARISE, HOW OFTEN DO YOU PREFER TO BE NOTIFIED?**

ASAP  
In a few hours  
That day  
Every few days





# Example Buyer Presentation: Home Wish List

**YOUR PREFERENCES**

kw

## Your Home Wish List

### TO BEGIN

Who will be living in this home?  
Let's list adults, children, and  
pets that will inhabit the space.

What are the non-negotiables for  
your home?

If you had to name your top five  
non-negotiables, what would  
they be?

Beyond your top five needs, what  
is something you really want?

Do you have a preference for the  
year the house was built?

Do you want a house in move-in  
condition or are you willing to do  
some work on it?

When people visit your home,  
what do you want it to say  
about you?

Are there any specific features  
that would make your next house  
feel instantly like home?

Will you require accessibility  
options?





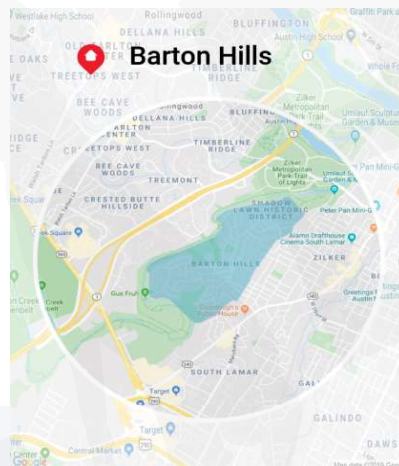
# Example Buyer Presentation: Your Neighborhood

YOUR NEIGHBORHOOD

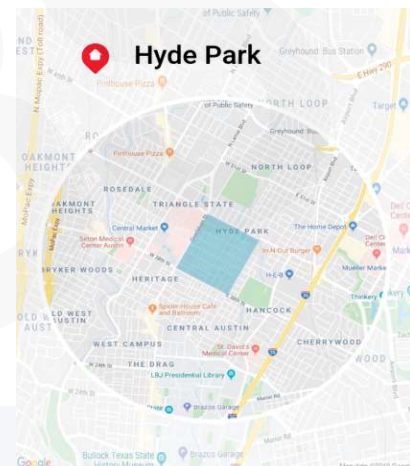


# Neighborhood Insights

**Barton Hills**



**Hyde Park**



- Average Listing Price .....
- Average Selling Price .....
- Average Price/Sq. Ft. ....
- Average # Days on Market .....
- Total Active Listings .....
- Total Pending Listings .....
- School Ratings .....
- Neighborhood Website .....

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## NOTES

# Prepare the Buyer Presentation

Where do you find the information to complete the neighborhood insights details?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

What neighborhoods would you include for your role play partner based on their answers to the home wish list?

1. \_\_\_\_\_
2. \_\_\_\_\_

*For help with Neighborhood Snaps, go to [answers.kw.com](https://answers.kw.com)  
Click on Command Support, then click on Create a Neighborhood Snap Print or Social Design*



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# Example Buyer Presentation: Buying 101

## How Buying a Home Works

### 1 PARTNER WITH AN AGENT

- Absorb their local insight
- Get to know neighborhood inventory levels
- See what's about to hit the market
- Gain access to off-market properties
- Review market averages
- Complete needs assessment

### 2 GET PRE-APPROVED FOR A LOAN

- Understand what you can afford
- Determine your monthly mortgage payment
- Understand your debt ratio
- Prepare for escrow
- Obtain a pre-approval letter

### 3 FIND YOUR NEW HOME

- Compare home and neighborhood averages, then narrow down the neighborhoods you want to live in.
- Favorite homes and save them to collections
- Nix homes that don't meet the mark
- Schedule home tours and plan an itinerary with your agent
- Decide on your dream home

### 4 MAKE YOUR OFFER AND NEGOTIATE THE TERMS

- Review contract terms and time limit for offer
- Negotiate purchase price
- Choose a title company
- Shop home insurance options
- Prepare for down payment, earnest money
- Choose a target closing date
- Sign the offer
- Deliver escrow check
- Stay in close contact with your agent

Preapproval: \_\_\_\_\_

Prequalification: \_\_\_\_\_

# Example Buyer Presentation: At Your Service

# Keller Mortgage

Home Loans Made Simple. Integrated with KW technology, Keller Mortgage makes for a swift, simplified experience that expedites the process so you can move into your new home, faster. Available exclusively through KW agents like me, you'll enjoy unprecedented savings on time and money.

**The Pre-Approval, Perfected**

- 1 Apply directly and digitally
- 2 Simplify and expedite the process

**The Zero Plus Loan**

- 1 Keller Mortgage exclusive
- 2 Eliminate signing and lender fees
- 3 Shave off up to \$1,000 from third party costs
- 4 Enjoy super low interest rates

**The Bottom Line**

Working with a Keller Williams agent like me has its perks. Whether this is your first time securing a home loan, or it's your fifteenth and you're ready for a better alternative, look to Keller Mortgage for a modern-day mortgage solution.

*Keller Mortgage operates in 49 states. Not currently available in New York.*

**GLOSSARY**

## Affiliated Business Arrangement Disclosure

kw

TO  DATE

FROM

This is to give you notice that , with which your agent is affiliated, has a business relationship with Keller Mortgage, LLC. (Keller Mortgage). Certain officers, directors, and owners of Keller Williams Realty, Inc. ("KWRI"), our franchisor, have indirect ownership interests ranging from an estimated one to 44 percent in Keller Mortgage. Because of this relationship, this referral may provide KWRI and/or officers, directors, or owners of KWRI a financial or other benefit.

Set forth below is the estimated charge or range of charges for the settlement services listed. You are NOT required to use the listed provider(s) as a condition for settlement of your loan on or purchase, sale, or refinance of the subject property.

**THERE ARE FREQUENTLY OTHER SETTLEMENT SERVICE PROVIDERS AVAILABLE WITH SIMILAR SERVICES. YOU ARE FREE TO SHOP AROUND TO DETERMINE THAT YOU ARE RECEIVING THE BEST SERVICES AND BEST RATE FOR THESE SERVICES.**

Provider (settlement services): Keller Mortgage, LLC (mortgage loan) Range of charges: Loan Origination Fee 0 to 2% of loan amount, application Fee 0 to \$500 & loan discount fee/points 0 to 3% of loan amount. The loan discount fee/points are effected by the interest rate on your loan and may be higher if your interest rate is below market. In addition, the lender may require that you pay for services of an attorney, credit reporting agency, or real estate appraiser chosen.

SIGNATURE SIGNATURE

# Example Buyer Presentation: My Promise



## Real Value Real Experience



FirstName LastName  
**CEO and Founder of  
Your Name Properties**

### CREDENTIALS

BA History  
**Univ. of Springfield**

Board Member  
**Springfield Giving Trust**

Founder  
**Keys of Caring Springfield**

When you choose to work with me, you're partnering with a trained agent that has the backing of the world's largest real estate company, consisting of 180,000+ associates around the globe. That puts your search in the hands of the largest, most resourceful real estate network.

And, by choosing to partner with me and the Keller Williams family, you gain access to a suite of technology that keeps you informed and engaged with what's happening in the neighborhoods you're eyeing.

Keller Williams was built on a simple-yet-revolutionary principle: people are what matter most. To help cement this understanding, we've formalized a belief system that guides how we treat each other and how we do business.

# 15

YEARS IN BUSINESS

# 268

TOTAL CLIENTS SERVED

# 61

REPEAT CLIENTS (23%)

# 40

CLIENTS SERVED IN 2019

**kw** DBA NAME  
KELLERWILLIAMS.

Keller Williams Realty Market Center  
123 Loren Lane | Spokane, Wa 98001

**Royals**  
Realtors

- WIN-WIN** or no deal
- INTEGRITY** do the right thing
- CUSTOMERS** always come first
- COMMITMENT** in all things
- COMMUNICATION** seek first to understand
- CREATIVITY** ideas before results
- TEAMWORK** together everyone achieves more
- TRUST** starts with honesty
- SUCCESS** results through people



# Prepare the Buyer Presentation

What are your numbers?

	Team	Market Center
Years in Business		
Total Clients Served		
Repeat Clients		
Clients served in 2019		

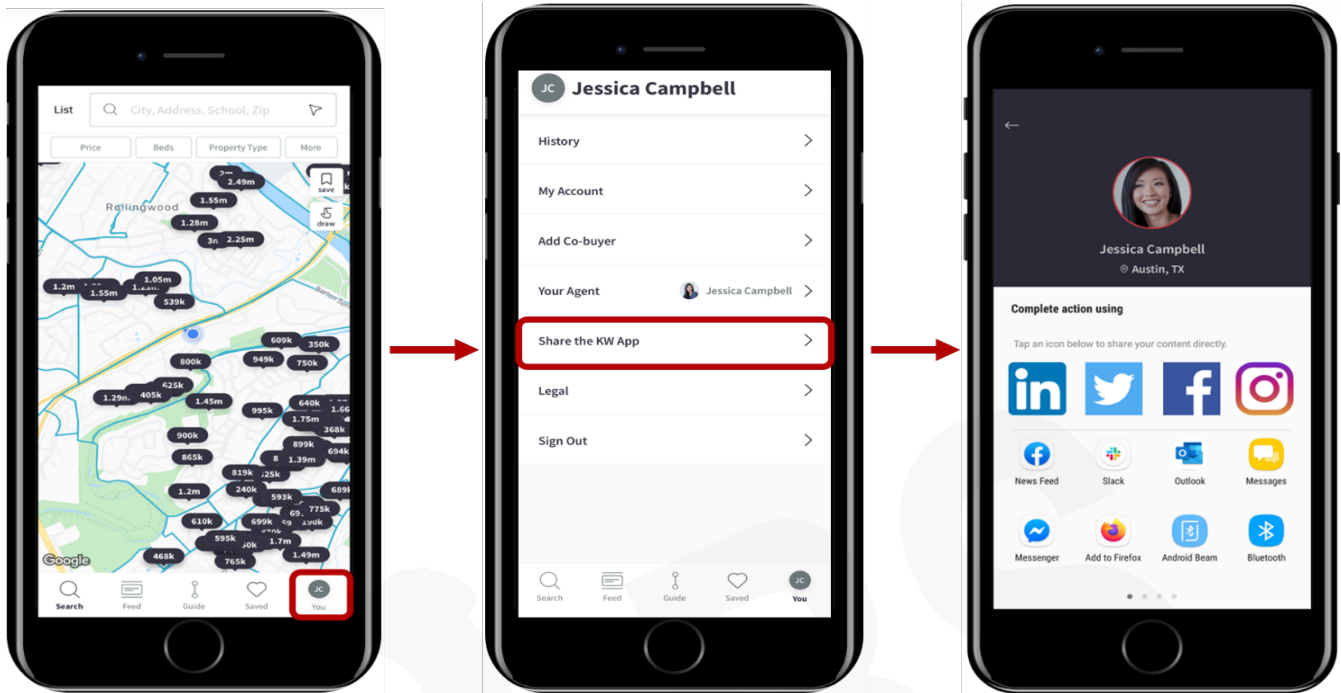
What numbers would you use to highlight your value proposition?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

What credentials will you share in your Buyer Presentation?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# Share Your KW App



- Get Started with the KW App on [answers.kw.com](https://answers.kw.com)
- KWConnect Tech Enabled Agent Page
- Chat with support using the ? in Command

What are the resources in your Market Center for help with the KW App?

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# The KW App

## Part One: Customize Your Consumer Experience with the KW App

### Instructions:

1. Use this guide to map out the steps your clients will take during the buying and selling process.
2. Print this guide for your seller process and again for your buyer process.
3. Go to [agent.kw.com](https://agent.kw.com) and log in. 
4. Go to [go.kw.com/appsetup](https://go.kw.com/appsetup) to set up your personalized app. 

## BEFORE

To communicate with your clients, you first need to understand how people and transactions move through your business.

Use the space below to map the current flow of your business from **a buyer or seller lead up until the appointment.**

Example:

1. Decide to sell your home.



1. In which part of the transaction process do buyers and sellers need the most assistance or have the most questions?
2. What extra guidance can you provide to address those questions and concerns?

# The KW App

## Part One: Customize Your Consumer Experience with the KW App

**DURING**

What transactional milestones and customer service activities are important for your buyers and sellers once an Opportunity has been created in Command?

Use the space below to map the current flow of your business for **all stages of an Opportunity**.

### Appointment:

Example:

1. Review the listing agreement.

### Active:

Example:

1. Review offers.

### Under Contract:

Example:

1. Home inspection.

### Closed:

Example:

1. Close.



### Consider:

1. In which part of the transaction process do buyers and sellers need the most assistance or have the most questions?
2. What extra guidance can you provide to address those questions and concerns?
3. Look at your listing presentation or buyer presentation. What transactional milestones do you want to include in your KW App Guide?

# The KW App

## Part One: Customize Your Consumer Experience with the KW App

AFTER

Consider what happens after a transaction closes. What do you want the client to see?

Use the space below to map the current flow of your business **after a transaction closes**.

Example:

1. Submit the signed closing disclosure to the Market Center.



### Consider:

1. In which part of the transaction process do buyers and sellers need the most assistance or have the most questions?
2. What extra guidance can you provide to address those questions and concerns?

# Turn Aha's into Achievement



How has your **thinking** changed?



What do you **feel** differently about?  
What was meaningful for you today?



How will your behaviors be different going forward? What **actions** will you take?



What **tools**, models, or systems will you use? How will they make you accountable?

accountable?

