

Buyer Consultation Observer's Checklist – Gold Services Manager

Conduct the Meeting	Y	N
1. Establish Rapport & Build the Relationship		
Made eye contact, used the Buyers' name(s). Was approachable, friendly, and sincere.		
Complimented the Associate – emphasized Associate's knowledge, experience and success in the business.		
Related to Buyers and their reasons for purchasing. Expressed empathy with their situation.		
2. Uncover Buyers' Needs for Financing Their Home Purchase		
If pre-approved, probed further to learn about Buyers' experience ("What company did you work with?", "Did you meet the loan officer personally?", "How long ago was this?" "So it was all done online, then...."). If Buyers have not been pre-approved, explained benefits of having a pre-approval and how it helps make the buying process go smoothly.		
Stressed the Weichert Difference ("At Weichert, we do things a little differently. Let me show you how we work . . .").		
All steps below are to be conducted using the GSM Buyer Consultation presentation		
3. Share GSM Value Story		
Clearly defined GSM's role in the process. "I'm here to help you with all the home-related services you need and expect: mortgage, title, homeowner's insurance – you need all three to purchase a home. We want to take the stress out of your home purchase experience. Closing on time means that when you're ready to go with everything packed and the furniture on the truck . . . we have everything ready on our side so you can close on the date you expect. We are so sure of our service, we guarantee it. We'll pay you \$5000 if we should fail to close on time."		
Reinforced the value of face-to-face meeting. "We believe personal service is important. That's why I'm here . . . At Weichert, we do it all for you . . . from securing a mortgage to arranging for moving services."		
Explained unique benefits of our Gold Guarantee and connections services. Handed the Buyers the Gold Services Checklist and the 'Folio of Services' brochure. "I'm also here to connect you to other home services such as a locksmith to change your locks before you move in. This brochure gives you the full array of services we provide. Just check off anything that you're interested in and the next time we meet we can get everything arranged."		
4. Validate Now is the Time to Buy		
Explained the unique advantages of the current Buyer's market.		
Re-emphasized historically low rates using personal insight. Explained the 30-Year Mortgage Rate chart.		
Explained how as interest rates rise, buying power decreases. Used the Interest Rate vs. Buying Power graph.		
5. Complete Pre-Approval		
Confirmed Buyers' price point.		
Verified Buyers' monthly payment comfort level, available down payment, how long they plan to be in the home.		
Completed the pre-approval process and explained how Weichert's pre-approval positions Buyers for a strong offer.		
6. Close the Meeting		
Re-emphasized "now is a great time to buy."		
Invited Buyers to come back when they have found the house they want to purchase.		
Reinforced the benefits of working with the Associate.		

