

Buyer Consultation Observer's Checklist – Sales Associate

Conduct the Meeting	Y	N
1. Establish Rapport & Build the Relationship		
Made eye contact, used the Buyer's name, was approachable, friendly, thanked customers for the opportunity to work with them, etc.		
Related to the Buyer (asked about the children, dogs, something of interest to them).		
Emotionally connected with Buyers and their priorities or motivations (related to when and how they met, probed around the Buyers' goals for their next move, validated Buyers choice in location or timing, etc.).		
All steps below are to be conducted using the Associate's Buyer Consultation presentation		
2. Preparation Leads to Success		
Previewed what would be covered in the meeting: <ul style="list-style-type: none"> <input type="checkbox"/> Your wants & needs <input type="checkbox"/> What's happening in this market <input type="checkbox"/> The home buying process <input type="checkbox"/> Additional helpful Weichert services <input type="checkbox"/> Select homes to buy and start looking 		
3. Conduct the Buyer Consultation		
Followed the agenda – followed the sequence and presentation.		
Used the 'Getting to Know You and Your Next Home' form to learn about the Buyers and their goals & priorities. Used "How do you feel about . . ." questions to learn about Buyers' wants and needs. Has the "mental exclusive."		
Used the Weichert brochure as a way to engage the Buyer and explain the home buying process.		
Signed Pledge of Service - "This is my personal commitment to you – to represent you every step of the way."		
Demonstrated value all along the way – used dialogue such as "What makes me different . . ." "I go one step further in working with my customers . . ." "Here's another example of how we think about your needs first in this entire process . . ." "Anyone can show you houses. I'm your eyes and ears to every property."		
Reviewed agency and secured Buyers' signature on appropriate state disclosure document.		
4. Introduce the Buyer to the Gold Services Manager		
Introduced the Buyers to the Gold Services Manager.		
Used the Defer technique to buyer objections: "I'm already pre-approved" or "I have a relative in the mortgage business." "That's great . . . as a Weichert customer, you're entitled to a number of complimentary services that my Gold Services Manager will explain."		
While Buyers meet with the GSM, the Associate accesses the MLS to select properties.		
5. Close the Meeting		
Selected homes based on Buyers' needs. Demonstrated knowledge of the inventory as they discussed the homes.		
Asked the Buyers if they had any questions or concerns.		
Secured next appointment to see houses OR transitioned to "let's get started and go see these homes!"		

