

# Weichert Getting to Know You Observer's Checklist



Conduct the Meeting with CARE. Compliment, Ask, Relate, show Enthusiasm.	Y	N	N/A
<b>1. Establish Rapport</b>			
Made eye contact, used the client's name, was approachable, friendly, showed enthusiasm, etc.			
Complimented them on their home, choice of furniture, décor, etc. Was genuine.			
Related to the client (found common ground, "you have a dog . . . I love dogs." etc.)			
<b>2. Take the Lead &amp; Set the Agenda</b>			
"Before you show me your home, let's sit and talk."			
"What I'd like to do today is: Understand your situation Have you show me your home as you would want it shown to a buyer Set up our next appointment so I can share your customized Marketing Plan Does this agenda work for you?"			
Encouraged the client to ask questions along the way.			
Explained Agency*			
The steps below are conducted using the Getting to Know You and Your Home brochure			
<b>3. Uncover the Sellers' Needs and Priorities</b>			
Used the Getting to Know You and Your Home to ask questions and learn about the sellers.			
Elicited the sellers' motivations, needs, concerns and priorities through open & closed questions.			
Listened. Summarized and reflected back to the sellers what you heard.			
Emotionally connected with the client and their priorities or motivations.			
<b>4. Get to Know the Home</b>			
"Now that we're getting into a little more detail on your home, I'd like to get a tour from you. Would that be alright?"			
Took more notes and took pictures for the customized portfolio.			
As you toured the property, showed how you <b>CARE</b> : Complimented the sellers' home, Asked questions, Related to the sellers and showed Enthusiasm.			
Used the Defer technique to any questions concerning commission. "We'll get to that later . . . could you show me the basement?"			
<b>5. Close and Confirm 2<sup>nd</sup> Appointment</b>			
Scheduled a date for the next meeting.			
"When I return, I will have a customized marketing plan along with a price trend analysis specially prepared for you so we can discuss everything I will do to effectively price and market your home."			
Provided the Weichert Brochure and explained the Pledge of Service			
"Thank you for the opportunity. You have a lovely home. I'll see you this Thursday."			

\*You may choose to explain agency in a different sequence than what's recommended here. As long as the explanation takes place some time during this conversation, you have met your obligation to your client.