



## The 5-Step Listing Appointment

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The current real estate marketplace is extremely tight – inventory is scarce, and buyers are scrambling to put offers on the homes they want. This is a sellers' market, so naturally, agents across the country are out to get listings to establish more control in their business, gain promotional leverage, and increase the number of referrals they get from their transactions in order to stay ahead of the game.

In this report, we are going to cover The Paperless Agent's 5-Step Listing Appointment – a system we developed that is proven to get more listings and generate more referrals! You'll deliver the appointment on your mobile device, which will WOW your client with modern real estate technology while presenting a persuasive, memorable experience that is certain to give you a competitive advantage.

We'll cover the mobile applications we use in this appointment, how we use them, as well as masterful sales principles to use in order to get that listing. Now let's get started!

## Step 1: Asking Questions

### **Apps: Evernote**



Here at the Paperless Agent, we teach that an extremely likely experience when arriving at your listing appointment is being greeted with "Welcome! Can I give you a tour of my home?" as soon as you knock on the door. It is very natural for us as real estate professionals to say "Yes" out of instinctive courtesy.

Unfortunately, if we follow this course of action, we're giving the client total control over the appointment.

Instead of just saying "Yes" immediately, what we can say instead is...

*"Yes, I would love to inspect your home with you, but first, I'd like to sit down with you at the dining room or kitchen table and review with you everything we've talked about on the phone."*

When you sit down with them, the first thing you'll want to pull up on your mobile device is your documented initial client consultation in Evernote. This is the template you will have completed over the phone with your listing client before you arrive at the appointment. Review this document in detail with your client first. We do this for three reasons...

*1. It's always good to confirm that your information still accurately reflects your client's desires, and the client may have followed up on some your initial*

*questions to give you more accurate data.*

*2. It really shows your customer that you are actively listening to them and documenting everything that they've said, which demonstrates your attention to detail and your care for the clients' needs.*

*3. You are sharing technology with the customer that truly separates you from other real estate agents.*

## Step 2: Inspecting The Home

### ***Apps Used: Evernote***



*Stay in Evernote on your mobile device, and pull up a Listing Appointment Template.* This template is a pre-made document that lists all the inquiries you'll make to acquire all of the information you'll need on the Listing Appointment (Address, Home Features, Asking Price, etc.). Having this pre-built template in your notes allows you to breeze through the appointment without missing any details.

Run through your Listing Appointment Note, typing in applicable information throughout the needed fields. Once you are finished acquiring all the verbal information about the home you will need, you can then begin inspecting the home. There are three ways you can document your home inspection in Evernote:

***1. Camera feature.** Using the camera feature to take pictures and place them directly in the Listing Appointment note allows you to have your photos of the*

*home in the same place as your appointment notes. Additionally, this will be a true "WOW" factor for your client's 5-star experience.*

*2. Microphone recording. We often talk faster than we can type, so taking audio clips throughout the inspection and dropping them directly into the note can make you much more efficient.*

*3. Typing. The traditional method of documentation can be done on the go with your mobile device!*

Engaging in all three documentation functionalities ensures that you don't miss a single detail in your home inspection. Additionally, having all of these notations in the same document makes marketing and listing strategies easier to develop. Also, you are sharing technology with your customer that "WOW"s them with that 5-star experience.

## Step 3: Discussing the Marketing Proposal

### ***Apps: Keynote***



*We recommend when discussing the Marketing Proposal to use the Keynote app (or a similar presentation application). Using presentation software impresses your customer with a slide-based Listing Presentation / Marketing Proposal as you're sitting down at the table with them.*

Develop and customize your Marketing Proposal before your appointment, and practice going through it on your mobile device if you aren't used to the technology.

Be sure to customize the subtle details of the presentation to make the presentation a more personal experience for your client – name, address, neighborhood features, and perhaps even an image of their home will go a long way to making a memorable and persuasive presentation.

As you are sitting with your customer going through the Marketing Proposal at their kitchen or dining room table, you should empower the customer to take over your iPad or mobile device and swipe through the presentation at their own pace. This, again, gives the customer the "WOW" experience that will be lacking in comparison with other real estate agents. It also engages them in the appointment and adds a level of "fun" that won't soon be forgotten.

Additionally, this allows **you** to be the presentation. The Listing Presentation should be simple, but effective – and more used as a prompt, rather than a source of information. It should engage the client to ask you questions and elaborate on details yourself, making it more of a conversation than a slideshow.

We recommend using Keynote, but for those not using iPads, other comparable presentation applications will impress as well. For those of you with iPads who also use Windows desktops, Keynote is able to present both Keynote and Power Point presentations.

## Step 4: The Pricing Conversation

### **Apps: *iBooks, Numbers***



*Using iBooks* you can have an entire CMA ready to view in PDF format on your iPad. In order to do this, we recommend saving MLS listings as PDF documents on your computer. You can then e-mail yourself these documents, open them in the Email app on your iPad, then save them to iBooks for later viewing. This allows you to page through various comparable listings in the area with ease, which will allow you to justify your pricing suggestions without having to use a single sheet of paper.

When reviewing the comparable listings, allow your customer to scroll, zoom in, and flip through the PDF files. This engages the customer, maintains their interest, and provides a memorable experience that is not being replicated by other traditional real estate agents. This also shows the customer that all details in the listing are accounted for, and conveys your justifications with real listings at their fingertips without the need for binders and packets.



Once you have determined your listing price, *open your pre-populated customer Net Sheet in Numbers*. Before you have arrived at your listing appointment, you can have a pre-populated Net Sheet ready from your phone consultation to show your client just how much money they will be getting out of the sale. This also gives them total visibility of what their expenses are directly on your iPad, and how changing the total (if the price you determine ends up not being identical to the price they mentioned in their phone consultation) affects that. The Paperless Agent's Net Sheet template is available to The Paperless Agent course

members.

Once you have completed the Net Sheet, you can import it directly into your client's notebook in Evernote, keeping all of your documentation for the client in the same place! Let your customer see you import the document into Evernote to further impress them on the Listing Appointment.

### Step 5: Signing the Agreements

Apps: *zipForm Online, DocuSign Ink, and Evernote*

This is the "coup de grace" of the 5 Step Listing Appointment - signing contracts and agreements without a single sheet of paper!



Before the listing appointment, *upload a Listing Agreement into your ZipForm account* for ease of access when you are right there in the field on your appointment.

Open the Listing Agreement in ZipForm with your customer, and go through the agreement and make any edits as necessary with total client visibility. The fact that you are digitally editing the contract in the field will continue to WOW the customer and provide that exceptional 5-star experience that will separate you from other real estate agents in the area.



Once the edits are made, *you can open the form in DocuSign Ink directly from zipForm Online*. You can select "Get Signature" as soon as the app opens in order to start signing documents!



Next you will “Add a Signer”. Enter the signer's full name and email address to ensure that they, too, get a copy in their inbox. You will do this multiple times as the various listing parties that are present at the appointment finish signing the document.

Using the toolbar at the top of the app, you can select "Signature", "Initial", "My Name", "Date Signed", etc. Utilize various options when signing different fields of the Listing Agreement, depending on the kind of signature that is needed.

DocuSign Ink also allows you to e-mail the document to a remote, off-site signer for digital signature!



Once the Listing Agreement has been signed by everyone who needs to sign it, *you can export this document as a PDF directly into Evernote to save in your client's notebook.* After the listing appointment is complete, you can digitally share the entire client notebook via email, yet again giving them total visibility to the home-selling process, and impressing them with your cutting edge technology (and yes, this can be done even if your client does not have Evernote).

***Now that you have gone through The Paperless Agent's 5 Step Listing Appointment using your mobile technology, you are one step closer to becoming a Paperless Agent! For further information, visit [www.thepaperlessagent.com](http://www.thepaperlessagent.com), or email us at [support@thepaperlessagent.com](mailto:support@thepaperlessagent.com)***