
CUSTOMER EXPERIENCE

BUILDING SYSTEMS, RELATIONSHIPS, AND
LOYALTY

Instructor Version

Updated 2019 to v1.4

To best prepare to lead this course, in addition to studying the course and the timing guide ...

*Listen to “**Insights into Customer Experience**,” a one-hour webinar for instructors led by KWU Master Faculty, Bruce Hardie. Access the recorded webinar on KWConnect under the Customer Experience course page.*

Instructor: CX Course Videos

To locate the videos for this course:

1. Login to KWConnect.com, go to the Customer Experience (CX) Course, and click on the Videos tab.

Author: Keller Williams University



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- calculation of profit share contributions and distributions;
- calculation of agent compensation;
- evaluation of a Market Center's financial results;
- agent productivity strategies; and
- estimates of return on investment.

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SPECIAL THANKS TO THE SUE ADLER TEAM

and Hear It Direct!

... for their generosity in donating their fantastic “Hear It Direct” training videos to Keller Williams University for inclusion in this Customer Experience course. Sue and the Hear It Direct team hope the insightful panels and training featured in this course help deliver an excellent customer experience and grow your business!



The Sue Adler Team offers amazing customer experience in Short Hills,
New Jersey, and surrounding areas.

Instructor:

Set the expectations for the best class ever!

Welcome the class, introduce yourself, and tell the participants the schedule for the day: The class is from 8:30 a.m. to 4:30 p.m., with a midmorning break, a lunch break, and one midafternoon break. Lunch is on your own and/or sponsored by) (Sponsor).

Optional: Ask the participants to quickly introduce themselves: name, role, and location.

Ask:

How can we stay relevant and add value to our customers? How can we secure our future? These are the questions participants need to ask themselves today. Ask them to put their Customer Experience hats on as they go through each chapter and think about: what are ways with the information covered today that they can add value to their customers and deliver an experience the customer will talk about and value forever?

Tell:

Our belief is the role of the agent is more important today than ever with technology and new players in the industry. The level of service expectations has a higher level of value. Customer Service is no longer an advantage in the market today, what the Customer “Experiences” is!

Tell: Customer Experience is what makes agents competitive!

*The customer experience is what the customer **feels**; it is from their perspective and is unique to each customer. It begins with the first impression and interaction and continues throughout the transaction and after the closing. A “wow” customer experience is what makes a difference to the customer and to your business. The full “experience” is more important now in the age of the customer than it ever has been before.*

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INTRODUCTION

SLIDE #2
Click 1 of 2

Instructor:

Timing for this chapter: 50 minutes 8:30 – 9:20

45 minutes +8 minutes for 3 videos 24 pages (includes 5 pages of pre-work)

This course consists of lecture, participant interaction (learning from each other), and activities that will set and exceed expectations, serve customers, survey them, surpass expectations, and sustain relationships after the transaction, for life.

***Purpose of this chapter:** This chapter puts the participants in the proper mindset for changing their behaviors for success. You will cover why the participants are here, the value of customer experience, the cost of customer experience, and our Keller Williams culture.*

Chapter Overview:

Review and discuss pre-work, the cost of losing a customer, and the value of keeping customers when we deliver a wow customer experience to them. Chapter 1 covers the ever-changing customer and how important it is to know yourself, the agent.

Participants begin building their CX Five-S Model, with the goal that they will walk away with a foundational system to begin building their unique CX System to implement into your business.

In this chapter ...

- (CX) Pre-Work
- Why Are You Here?
- Build a CX System
- What Is Customer Experience?
- Reimagining the Customer Experience
- WI4C2TES
- Getting the Most Out of This Experience

Instructor:

The pre-work on the next five pages is here as a reference only. Ideally, participants have completed this and brought this to class.

The pre-work shows participants the value of delivering an exceptional customer experience and the price it costs when your customer has a bad experience.

Ask:

How many of you received and completed the Pre-Work for this class?

If most have not, allow a few mins for them to read “The \$24,000 Lesson” before you debrief it.

Take 5- 10 minutes to debrief the pre-work. They will be using their answers throughout the course.

(CX) Pre-Work

Want a steady business of repeats and referrals! Then BINGO, you've hit the jackpot. This is the course for you! **Complete this pre-work** and bring it along when you attend Customer Experience (CX): Building Systems, Relationships, and Loyalty.

I. The \$24,000 Lesson

Imagine you had to send the following email to your team ...

Team,

We had a seller cancel after being listed with us for one week, and there was not one thing they said I did not disagree with; I am embarrassed, disappointed, and not happy.

Just so we are clear (most of you have heard this before) when a client hires us, they have done so because they want the best! And they expect just that, their expectations are extremely high and rightfully so. At that point, their confidence is at its highest, and our job is to keep it there by doing what we say we will do and communicating often and clearly. You see, a little thing like a sign not showing up when they were told it would causes them to question whether we are too busy or whether they are important to us. It is just a sign to us, but to them EVERYTHING IS A BIG DEAL; this process of selling is the biggest thing going on in their lives! We need to treat it that way. When our sales partners don't go see their home within five days like they were told, their confidence in us goes down; when the write-up or photos are not world-class, we lose credibility. When the client sends an email to the entire team with information that is important to them and us and not a single person has the common courtesy, or common sense, to reply, what does this say? I know this, it does not scream, "you are important, we care about you, you chose the right agency!"

I hope that every person reading this is bothered by it, because if not, then you should be looking at whether you are up to being on the best team in our area. Please be honest with yourself and with me. If you are who I think you are, then take this as a valuable lesson (because we just paid \$24,000 for it), and learn and realize how important the Customer Experience is.

So that we can all focus, learn, and remember, I want each of you to take a minute and reply to this email with a sentence or two on what your definition of Exceeding the Customer Experience is or should look like for our team. Thank you for looking!

PRE-WORK

This is an actual email sent from the owner of a large, well-respected, and prominent real estate team to the staff, when they all dropped the ball and did not follow through with what they said they would do for a customer. As a result, the seller canceled their contract after one week.

- How upset would you be with your staff?
- How upset would you be with yourself?

The sellers told the agent that when their friends asked them about using their real estate company, their response was an emphatic “No!” These unhappy sellers ultimately did more damage than two “Nos.”

- What do we mean by this? Do you think their friends told others?

- Besides \$24,000, what else did the company “lose”?

Do you think this email to the staff made an impact on the way customer experience was approached in the future?

- _____

What would you have done if this happened to you as an agent?

- _____

2. Think back to the last service you recommended to a friend or family member.

What made the experience so great that you had to share?

3. Think back to a service you warned your friends and family about.

What was it about the experience that caused you to warn people to stay away?

4. Do It Well

Remember a time when you served a customer particularly well.

What did you do and how did you do it?	
What standards did you use? What technology? Who helped?	
How did it make your customer feel? How do you know?	
How did it make you feel?	

5. Your Customer Experience System

1. What systems do you have in place currently to ensure a WOW experience?

- Are your systems perfectly executed every time? Y N
- Why/Why not?

2. What has *contributed* to your success with customer experience?

3. What has *hindered* your success with customer experience?

4. What would you like to improve with your customer experience?

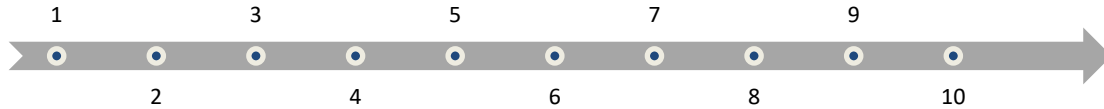
6. Think back to your last five transactions.

How would those five customers respond to the following questions?

- How did your agent bring you value?
- Did they understand and meet your needs? How?
- Did they exceed your expectations? How?
- Would you recommend your agent to others? Why/Why not?
- How could your agent have improved the experience for you?

7. How would your customers rate you?

Overall, how would this group of customers rate the current level of customer experience you provide on a scale of 1–10, 10 being the highest?



8. Local Market Statistics

Your average sales price:	
Your average commission rate:	

9. Database

How many names do you have in your business database?

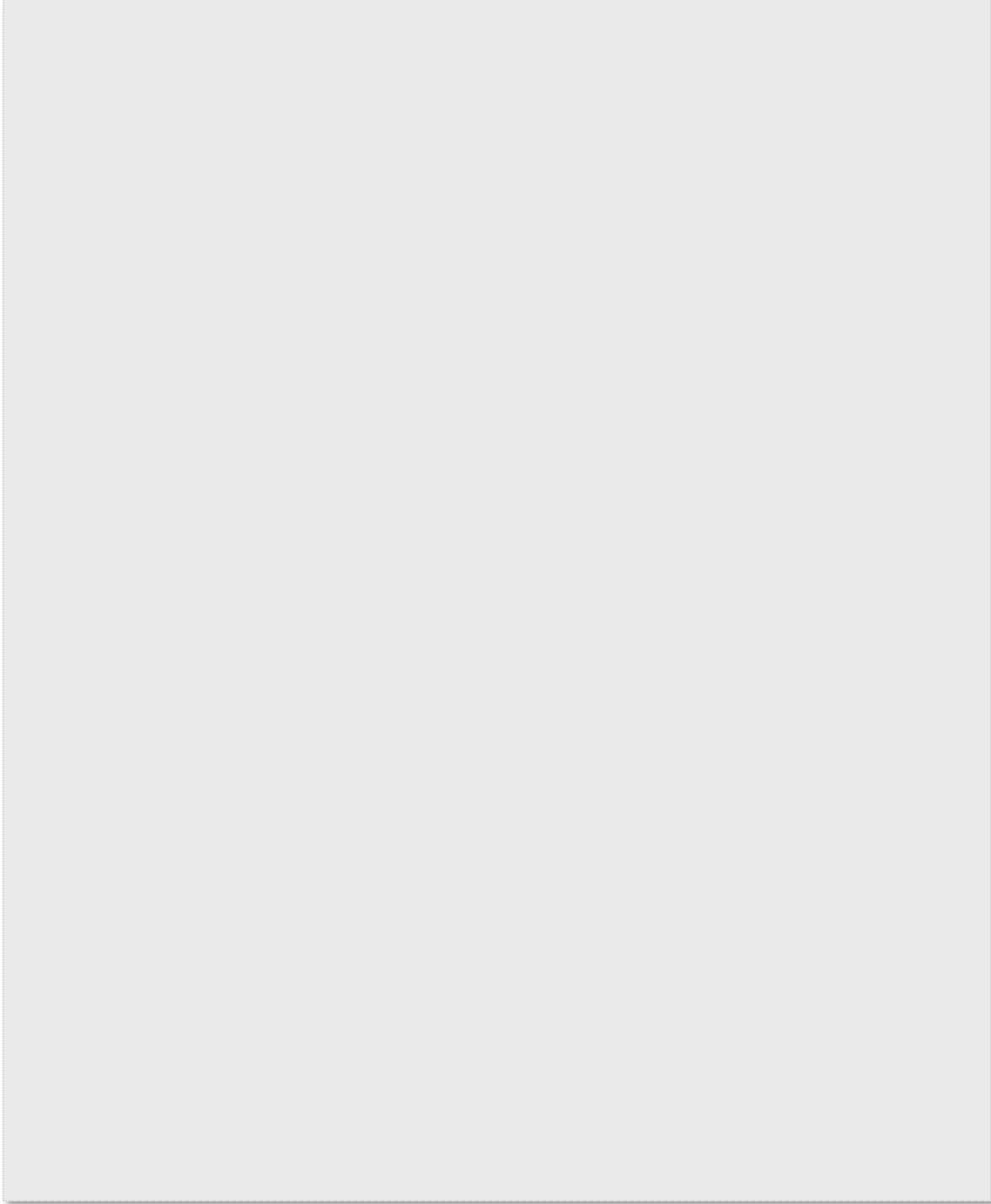
Number of names in database	
-----------------------------	--

10. Repeats and Referrals

What percentage of your business is from repeats and referrals?

Percentage of business – repeats	
Percentage of business – referrals	

11. What is your current advertising slogan/elevator speech/Value Proposition on your website/signs/business cards/marketing?



Instructor:

(This is for the beginning of the section: Why Are You Here?)

Tell:

Customer Experience is like dropping a pebble in a pond ... there is a ripple effect. It increases your business if it is good and decreases your business if it is bad.

Throughout this course, you will learn how the little things make a big difference when delivering a wow customer experience. You will go from E to P when you Set Expectations, Serve your customer, Survey and get feedback from them, Surpass expectations and Sustain your relationship for a lifetime. In each chapter you will design, and deliver an experience that is unique to each of your customers using the Five-S Model.

Today you will walk out of this class with the foundation of a system that will take your customer experience from average to extraordinary and will master delivering a wow customer experience that wows our customers for a lifetime!

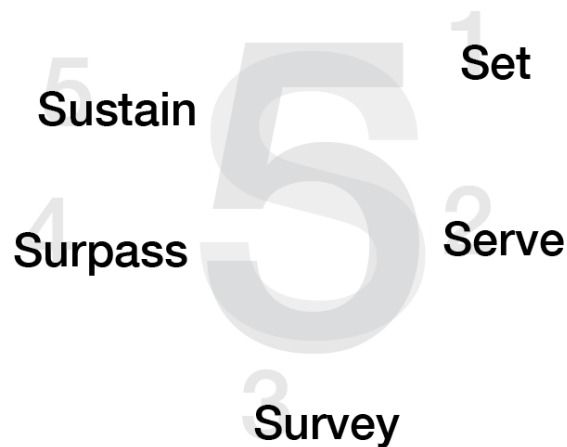
The goal of this CX system is for you to have "Raving Fans for Life" and when the customer thinks real estate, they think YOU and Keller Williams!

Why Are You Here?

This course is about the customer experience and the **value and professionalism** you represent and deliver to each and every customer every day.

You'll be introduced to the **Five-S Model** to create great customer experiences throughout the lifecycle of each customer. You can customize the systems for yourself and your team to ensure customers will think of YOU and Keller Williams Realty for their real estate needs, and you'll benefit from a lifetime of repeats and referrals!

Five-S Model



1. **Agent Goal:** to have repeat and referral business because you are known throughout your local market for delivering a stellar customer experience every time! The goal is for you to create a buying/selling experience that is a tangible and palatable improvement from any other agent. Customers will rave about you and their experience.
2. **Keller Williams Goal:** to be a family of customer-centric agents who deliver top-notch experiences and to be known throughout the real estate and service industries as the pinnacle of customer experience.

SLIDE #2
Click 2 of 2

SLIDE #3

SLIDE #4

Instructor:
Ask:
How many of you experienced the loss of a client like in the \$24,000 lesson? What did you learn from it? What changes did you put into place to prevent it from happening again? Today you're here to learn about: how to prevent mistakes by having CX standards and systems in place to guarantee an excellent experience for your customer and have raving fans for life. We cannot say that enough.

Entrepreneurial to Purposeful

Instructor:

Tell:

Moving from average to extraordinary is like the difference of just doing something and actually mastering it. To reach extraordinary requires you to break through from entrepreneurial—what comes naturally—to purposeful—mastery. It takes resolve, discipline and hard work.

Agents may already be delivering an excellent customer experience to their customers; however, can they exceed this experience even more?

Put together **systems** that ensure each customer's experience is over the top—an experience they rave about to their family, their neighbors, to others at baseball games, and even write about in social media.

When working with any customer, be **purposeful** when delivering their customer experience. Deliver an experience that exceeds their expectations and meets their unique needs.

High Achievers

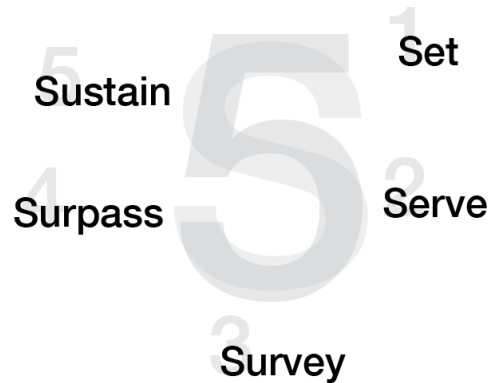
... are always looking for the purposeful way. By doing this, they break through the ceiling of their natural behavior.

The way you will consistently deliver experiences that exceed expectations takes a well-defined and run system—a system that is easily managed and duplicated.

Build a CX System

A stellar customer experience (CX) that consistently delivers value doesn't happen by accident. Agents who excel at providing excellent CX do not wing it, nor are they just lucky. They are truly purposeful and follow prescribed **models and systems** to ensure execution, which leads to loyalty, profit, and growth!

The Five-S Model



STEP #1

Set and exceed expectations at the beginning of the relationship and agree on them.

STEP #2

Serve customers by doing what you said you would do and doing it well.

STEP #3

Survey customers by constantly checking in to see how things are going.

STEP #4

Surpass customers' expectations by providing an unexpected service or handling some part of the transaction in an unexpected way ... exceed expectations.

STEP #5

Sustain the relationship over the lifetime of the customer so they provide you with repeats and referrals.

Instructor:

Tell:

The 5-S Model is the model you will use to build your own unique Customer Experience (CX) system.

This introduction is an overview of the 5-S Model. We begin building it in Chapter 2 – SET, after we cover Chapter 1 – Know Thy Customer and Know Thyself. We have to know our customers and ourselves to build and apply our 5-S Model.

SLIDE #6

Apply the Five-S Model to the CX Lifecycle

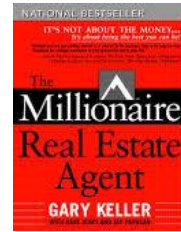
Instructor:

Tell:
The CX system you build will be applied to the ten service areas from the MREA.

Throughout this course, we will refer to these ten service areas as the CX Lifecycle and apply the CX Five-S Model to each touch point.

The CX Lifecycles on this page is also located in the appendix of this manual.

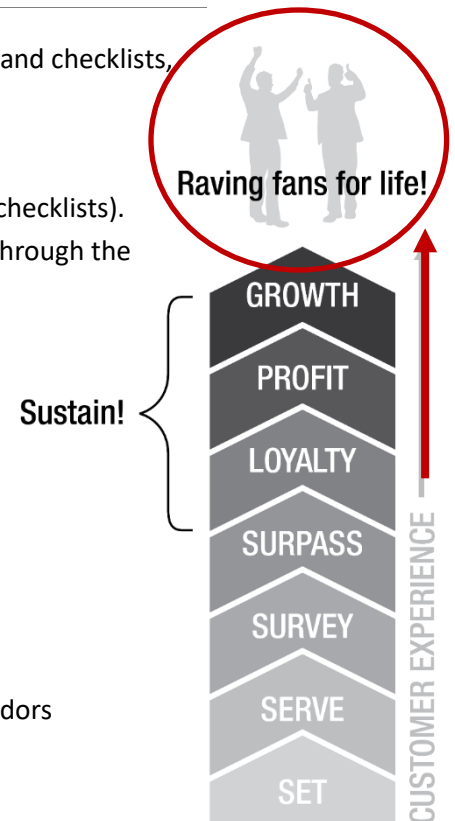
According to *The Millionaire Real Estate Agent*, there are **ten service areas** of the customer transaction. These are the critical touch points of the customer experience; we will refer to them as the **CX Lifecycle**. At each of the touch points of the CX Lifecycle, you can incorporate the Five-S Model where applicable to develop your own unique CX System.



Benefits of the Five-S Model

Professional agents follow a predetermined system of procedures, worksheets, and checklists, some of the benefits of the Five-S model will ...

- Bring value to you, your business and your customers.
- Replace your scraps of paper with systems (outlines, worksheets, and checklists).
- Ensure expectations are set and exceeded and that details do not fall through the cracks.
- Serve your customer that is consistent and unique to them.
- Build customer confidence in your ability to fully serve them.
- Help you be more organized and allow you to focus more on your customer and their needs.
- Share and communicate your progress.
- Surpass expectations and let your customer know when you do.
- Survey, provide and receive feedback throughout the transactions.
- Measure your success.
- Sustain the relationship after the close.
- Provide a road map that keeps you and your team along with your vendors consistent and on the same page.
- Make continual improvements.
- Profit and Grow your business.
- _____
- _____



SLIDE #7

*“If you want extraordinary results in your life,
you cannot be average.”*

– GARY KELLER



VIDEO
(2:30 MIN)

CX Course Video

Watch the video. What are your thoughts? Who defines the customer experience?

Instructor:

Show the CX Course video.

Ask for Aha's after the video.

SLIDE #8

What is Customer Experience?

CUSTOMER EXPERIENCE (CX)

The customer’s perception of all the interactions they have with us and the value it creates for them.

It is the emotions we evoke and our performance against their expectations over time.

Sources: CX Week; The ROI of CX, Diane Magers, AT&T

Instructor:

Ask

Service vs. Experience

participants

for differences

between

“service” and “experience.”

Example:

Dinner

Experience.

What is the difference?

Customer Service

Customer Experience

<p>Providing a service in an efficient yet common way, and solving issues reactively as they arise.</p>	<p><i>Answer: Being purposeful and proactive about delivering an exceptional “experience” the customer feels, sees, hears, and remembers you for.</i></p> <p><i>When you move customers emotionally. CX lasts the longest. It involves passion.</i></p>
---	---

Emphasize

that we’re

aiming for

Experience!



David Hoffman, owner of The David Hoffman Group in Huntersville, North Carolina, believes, “Ninety percent of our business is relationship based. It’s about treating everyone how they deserve to be treated, not how we would want to be treated, but how THEY want to be treated. ‘Customer Experience’ is everything to our business; it’s the only job security we have.”

SLIDE #9

TRUTH

You would have no business or future business without customers!

What Does Customer Experience Mean To You?

1. What does a great customer experience look like to you?

2. What does a great customer experience feel like to you?

3. What is your benchmark for measurement?

4. What are the most common things your customers want from you?

5. How are you making sure they get what they need?

Instructor:
Hold a discussion around the questions shown.

Notes

Myths

CUSTOMER EXPERIENCE	
Myth	Truth
Defined by you	<i>Defined by customers</i>
Starts and stops at the end of a transaction	<i>Starts and continues for a lifetime</i>
Meets the customer's needs	<i>Meets their needs and connects at an emotional level and exceeds expectations</i>
One size fits all	<i>Is personalized and touches emotions</i>
Addresses customer's specific issues as they arise	<i>Addresses issues plus any issues the customer didn't know they had</i>
Does not happens organically.	<i>You have to be intentional, set standards.</i>
Success is based on feelings alone	<i>Measureable by repeat and referral business and surveys</i>

SLIDE #11

Instructor:
Give each myth and ask for the truth before you provide the answer. Ask for other myths.

Tell: *Be proactive when there is an issue, we are the experts, we need to know what is happening.*

When a customer has a great experience, they return AND perform valuable marketing for you by telling family, friends, coworkers, and complete strangers via social media how great you are!

“Take care of the people who take care of you.”

SLIDE #12

- MARTIN BOUMA
 ANN ARBOR, MICHIGAN

Instructor:

Tell: *Companies are realizing that*

the customer

reigns supreme

and they must

meet and exceed

their customers'

expectations or

suffer the loss.

We must connect

and care about

our customers.

Ask for a

volunteer in the

audience to read

the Farmers

Insurance story.

Ask: *What other*

companies do you

think of with

customer

experience?

Ask: *What makes*

them so great?

Truths

The Customer Reigns Supreme

Farmers Insurance Group was seeing stagnant growth in customers and loss of repeat customers. They recognized the need to improve the customer experience to grow and attract new customers, as well as keep current customers.

They trained their call center staff to:

- Put themselves in the customer’s shoes
- Listen intently to the customer’s needs or complaints
- Respond agreeably and supportively
- Be patient and take their time with the customer
- Ask for agreement
- Value each and every customer
- Don’t hang up a call until the customer feels cared for



This initiative, called “Customer Connections,” improved customer satisfaction and retention, resulted in more than \$50M ROI, and increased their JD Powers score—an indicator used to measure customer satisfaction—from 827 to 859: the largest jump in score by any company in any industry.

What if you and your team were to adopt these standards with your

customers?

Instructor:

Tell: *If there is no connection, no loyalty there is no wow!*

VIDEO SLIDE #13



VIDEO (1:54 MIN)

Instructor:

Welcome to the Experience Economy

Watch this “Hear It Direct” video. What would your last customer say about their experience with you?

Tell: *Our goal is to deliver a “WOW” experience to our customers.*

After the video ask: What would your last customer say about their experience with you?

Are you creating an experience that drives a lifetime of referrals and repeat customers?

Tell: *Throughout this course today, think of ways you can deliver a “WOW” experience to your customers.*

The Benefit of a Great Experience



Maggee Miggins, of The Miggins Group in Short Hills, New Jersey, shares, “The customer experience is so important because you are in people’s lives. Buying and selling a home is one of the biggest decisions they will ever make and we need to make sure their experience is seamless and that they do not have to worry about anything. We need to give them extra value, putting those extra bows on things to make sure everything is flawless. If we cannot give our customers a great experience, we are not going to get their business back and we will not get referrals, and that is the lifeblood of our business.”

Instructor:
Ask (optional) a participant to read the story out loud.

Tell: *Is this common sense? YES Does it happen? NO*

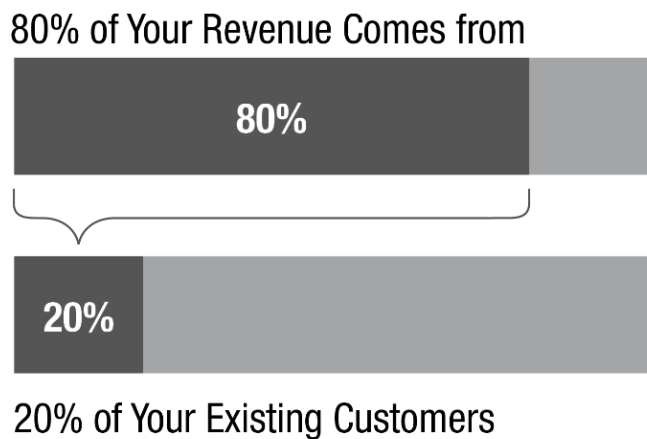
Repeat Customers and Referrals Are Golden – Get ‘Em and Keep ‘Em!

In the real estate business, customer acquisition and retention is essential, and the customer experience plays a huge part in your success at both. When a customer has a great experience, you gain both a returning customer and new customers. These are golden and what we’re after!

An article in *Forbes* magazine describes this in the context of the 80/20 Principle, which we are all familiar with 80 percent of your company’s revenue comes from 20 percent of your existing customers.

SLIDE #14

Instructor:
Share your own repeat and referral percentages.



Tell: *Think of a gap as an opportunity. Great CX creates a snowball effect, repeats and referrals.*

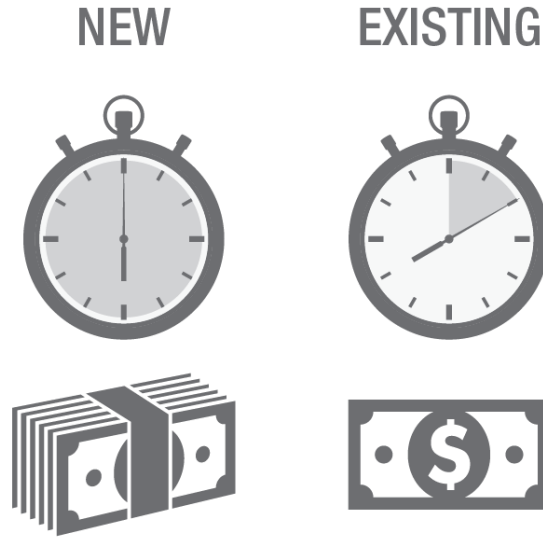
TRUTH

It’s easier to keep a customer than it is to get a new one.

In addition, it is widely believed that bringing in **new customers** costs you, in time and money, **five times more** than keeping existing customers.

SLIDE #15

Instructor:
Tell:
Do not lose track of this thought ... we are not growing our business if our customers are coming and going. We need to sustain the relationship even after the transaction.



Your goal is to never let go of your customers so you earn their business over and over.

SLIDE #16

“The data is clear ... staying in relationship with your database is the #1 way to get more business.”

— GARY KELLER
COFOUNDER, CHAIRMAN AND CEO OF KELLER WILLIAMS REALTY

Customers Bring You Value

Happy customers provide intangibles that are beneficial to your business such as loyalty, and affirmation of your professionalism and reputation.



What other **value** does the customer bring to you and your business?

- *Confidence, Reviews, Opportunities ...*
-

-

Instructor:

Tell:

*Your real estate license is a winning lottery ticket, and in order to cash it in, you must deliver **value** and **experience** to your customer every time!*

In return the customer gives so much value back to you and your business.

Ask: What other value does the customer bring back to you and your business?

“Let’s not forget that little emotions are the great captains of our lives and we obey them without realizing it.”

– VINCENT VAN GOGH

Instructor:

Bring up the \$24,000 lesson again in this discussion.

The Cost of a Bad Experience

With today's social media, reviews, and word of mouth, bad experiences can cost you money and your reputation. Even one disgruntled customer can affect your business.

Disappointed customers can be costly for your business ...

SLIDE #17**Tell:**

There are two truths that can differentiate you from other agents:

1. Always tell the client the truth, not what they want to hear.

2. Do what you say you are going to do.

TRUTH

- 25 percent of customers will switch providers after just one negative experience
- A single customer could share a negative experience 357,000 times in social media
- 19 percent will not trust a company after one bad experience
- 59 percent of customers say they don't have a relationship with their provider

Source: *thunderhead.com*

When the experience is not so good—or worse, bad—the customer likely never returns, and more importantly, they spread the word like wildfire about how bad the experience was, how they'll never go back, and recommend others to stay away!

TRUTH

Customers are more apt to share a negative customer experience than share a positive customer experience.

SLIDE #18

“Your most unhappy customers are your greatest source of learning.”

— BILL GATES

Reimagining the Customer Experience

How would the customer experience you provide change if:

- You used a platform that spoke directly to the consumer app your customers use?
- You received notifications when consumers downloaded your branded app?
- Customers could communicate with you through their app?
- You could see exactly what your customers home shopping preferences were and how they changed over time?
- Customers had access to customizable digital timelines and checklists that guided them through the home buying and selling process?
- You could partner with consumers to identify exactly what they want from a real estate experience?
- Your platform helped you provide ongoing and individualized value even after your customers buy or sell?

Keller Williams is putting you in charge of your own data and enhancing the real estate experience—for both you and your customers—by providing an end-to-end experience that solves a lot of pain points.

SLIDE #19



VIDEO
(2:28 MIN)

KW App: Dream the Dream Video

Watch the video. How will this app change the way you communicate and work with your customers?

Instructor:

*Show the KW Consumer App video.
Ask for Aha's after the video.*

Instructor:

ASK:

Think about the apps on your phone. Which apps give you the best experience? How do they do that?

Explain:

Most apps serve us best when they are able to collect data on our preferences and customize our experience.

Ask:

How would you like to have something like that for the real estate experience?

How Can You Reimagine Your Customer Experience?

Instructor:
Hold a discussion around the questions shown.

SLIDE #20

1. Look back at your list of the most common things your customers want from you. How will the Consumer App help you provide your customers with those things?

2. How will real-time, data-driven insights allow you to better serve your customers?

3. How will the Consumer App change the customer experience you create?

4. How will Command and the Consumer App help you build a moat around your database?

WI4C2TES

Keller Williams Realty's culture is rooted in our beliefs around customers and how we conduct business with them. Our beliefs emphasize bringing value to our customers and exceeding their expectations ... Customers: always come first.

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
Equity: opportunities for all
Success: results through people

The WI4C2TES form the foundation of a great customer experience!

SLIDE #21

Instructor:

Tell:

The culture of Keller Williams Realty is living the mission, vision, values, beliefs, and perspective of Keller Williams Realty. Our beliefs are the rules we live by and they dictate how we work together and treat each other. It promotes and believes in delivering an exceptional customer experience. Customers: always come first! It's not just words; it's how we act and execute.

Instructor: Review the three types of learners. Point out that Prisoners and Vacationers don't get much of anything out of class. Explorers who embrace learning for earning sake, participate fully, and commit to implementing what they learn are the true winners in class. Remind them (and yourself) that this is a DOing class!

Getting the Most Out of This Experience

You have begun an exciting journey toward ramping up your business. What kind of student will you be in this class?

The Prisoner	The Vacationer	The Explorer
<i>Has to be there, doesn't want to be there, and doesn't know why they're there.</i>	<i>A day in training is better than a day on the job.</i>	<i>Excited and curious about the new knowledge, skills, and tools they will discover in class.</i>
Doesn't engage	Spends as much time chatting as listening	Listens attentively, then participates fully in discussions and exercises
Spends class time catching up on their emails	There to have fun—distracts the class with irrelevant comments	Asks meaningful questions and contributes compelling aha's
Escapes by spending time in the hall on their phone	Returns late from break and lunch	Arrives to class on time and returns promptly from breaks
Holds on to limiting beliefs	Not purposeful in their learning goals	Adopts a posture of acceptance
Multi-tasks on their computer by working on side projects	OMG! Spends the day on their smartphone, texting and checking Facebook	Takes notes in their manual for future reference
Picks fights with trainer or other participants if they don't agree	Isn't paying attention	Respects the different learning styles and opinions of others

Hopefully you picked "The Explorer!"

Chapter Take-Aways

- Customer service is not the same as customer experience. CX is so much more and covers the lifetime of the customer.
- Own your customers so you get repeat and referral business!
- Learn from and correct your mistakes.
- Leverage KW technology solutions to provide an end-to-end customer experience.
- Live and breathe the KW belief statement: WI4C2TES – Customers: always come first.

SLIDE #22

Instructor:
Review the main points of the Introduction to the Customer Experience course today, and ask for aha's.

From Aha's to Achievement

AHA's

Instructor

Examples

- *CX takes time and patience.*
- *CX is personal to every agent and personal to every customer.*
- *Not implementing CX standards and systems for you and your team and delivering a valuable CX to your customer is a missed opportunity.*

Tell: *It's not one thing that makes the difference—it's the whole experience!*

What are your Aha's?

CHAPTER 1: KNOW THY CUSTOMER AND THYSELF

Instructor:

Timing for this chapter: 60 minutes – 9:20 – 10:20

45 minutes +5 minutes for 2 videos +10 minutes “My CX System” 24 pages

<<10 Minute Break – 10:20–10:30>>

***Purpose of this chapter:** To first understand the changing customer. They have different expectations more than ever with advances in technology and easy access to options. It is the “age of the customer”. Agents must have a good understanding of their customer—for example, what unique needs, wants, and expectations do their customers have, and how can the agent bring value to their customers?*

The second part of this chapter is to “Know Thyself”. The agent now more than ever needs to understand the importance of staying relevant, providing value, and being customer-centric in today’s age of the customer.

- *The agent is the source of information and knowledge in the real estate transaction; agents should always know their market and demographics, their strengths along with the behaviors of their customers.*

In this chapter ...

- *KW technology solutions will help agents accomplish all of this and more in a systematized way! Command and Kelle will work alongside the KW Consumer App*
- *Know Thy Customer*
- *Throughout this course, agents will work on writing their Value Proposition and incorporate how they deliver an exceptional customer experience into their Value Proposition.*
- *Know Thyself*
- *Agents should design, develop and adopt a Customer Experience (CX) system if they do not already have one. Beginning in Chapter 1 we will begin building their unique CX Five-S Model.*

Instructor:

Tell:

Some of this chapter may seem like basic information, or for just newer agents, so ask, “How do you go from Basic to Mastery and beyond?”

***Answer:** You continue to learn and grow!*

Know Thy Customer

In order to provide an exceptional experience that brings a customer back again (as well as potential referrals), you must have a good understanding of that customer—what unique needs and expectations do they have? Knowing your customer will help you bring value to them, provide an exceptional experience, and ensure a relationship that benefits both of you for a lifetime.

The root of the word “customer” is *custom*.

CUSTOM

[kuhs-tuh m] noun
habit; habitual practice which has the force of law.

Therefore, a customer is one who has a habit of choosing you.

SLIDE #24

*“Without customers our businesses are not very useful;
we would not be in business.”*

PETER CHABRIS,
TEAM CHABRIS,
CINCINNATI, OHIO

Cultivate the habit of customers choosing you!

The “Age of the Customer”

The twenty-first century has brought profound changes to the professional world, from technology to social media to customer expectations. We have entered the “age of the customer.” Buyers and sellers expect and demand a new level of customer experience. Details matter. Relationships matter. The customer matters!

Age of the Customer

Consumers are more empowered than ever because they can access information about products and services over the Internet in real time.

Source: TechTarget



Sue Adler is a mega agent from Short Hills, New Jersey, and founder of Hear It Direct—a seminar series featuring customers revealing their true experiences when buying and selling real estate.

“We don’t control the information anymore. Customers search for months for homes, starting their searches through their mobile phones, tablets, and laptops. Once they find something they like, they want more details and act quickly to find someone who will guide them honestly and add value to their search process.

Regarding communications, they want it on their terms, quickly. They want to be prepared for their experience and the market, and want to be told up front what will be expected of them. They want the agent to provide context so they can make a good decision. They would like the agent to be their partner in the transaction process. After listening to hundreds of buyers on panels, this expectation often falls short. Customers said they seldom received the information they needed or the experience they hoped for.”

Instructor:
Have a volunteer read the first paragraph and ask for aha's.

Have a volunteer read Sue Adler's story.

We want to make a difference, we will give customers the information they need and exceed their expectations and deliver an experience beyond their expectations!

Consider the changes to buying that have occurred over the last ten years ...

Instructor:**Tell:** *The changes* **New Shoes Experience**

in how customers find and buy products today is totally different than ever before.

As agents we need to adjust. Let's look at the shoe-buying example, then ask for other examples of how the customer experience has changed, and improved!

*Example: Buying: Books – Amazon
Cars – Tesla, Lexus*

Ask:

*How do online reviews factor into the experience?
We cover online reviews in depth in Chapter 4 Survey.*

THEN

You get in the car, decide which store to visit, drive through frustratingly slow traffic, arrive at the mall, park at the outskirts of the parking lot because it's full, and finally walk into the store. You're tired already! You walk around looking at shoes while the one clerk in the store helps another customer. When it's your turn, the clerk heads to the back room to retrieve the shoe you want in your size. You try on the shoes, you like them, pay for them, and head out of the store to return home. Nearly 90 minutes have gone by but your new shoes feel great!

NOW

Anyone shop at Amazon or Zappos?

- What's the experience like?
- How is it different from the above experience?

Instructor:

Convenient, Saves Time, Many alternatives

Show the video.

Tell: *Think about how you can bring value to your customer(s).
Debrief the video by asking for Aha's.*



**VIDEO
SLIDE #25**

**VIDEO
2:21 MIN)**

The Information Age

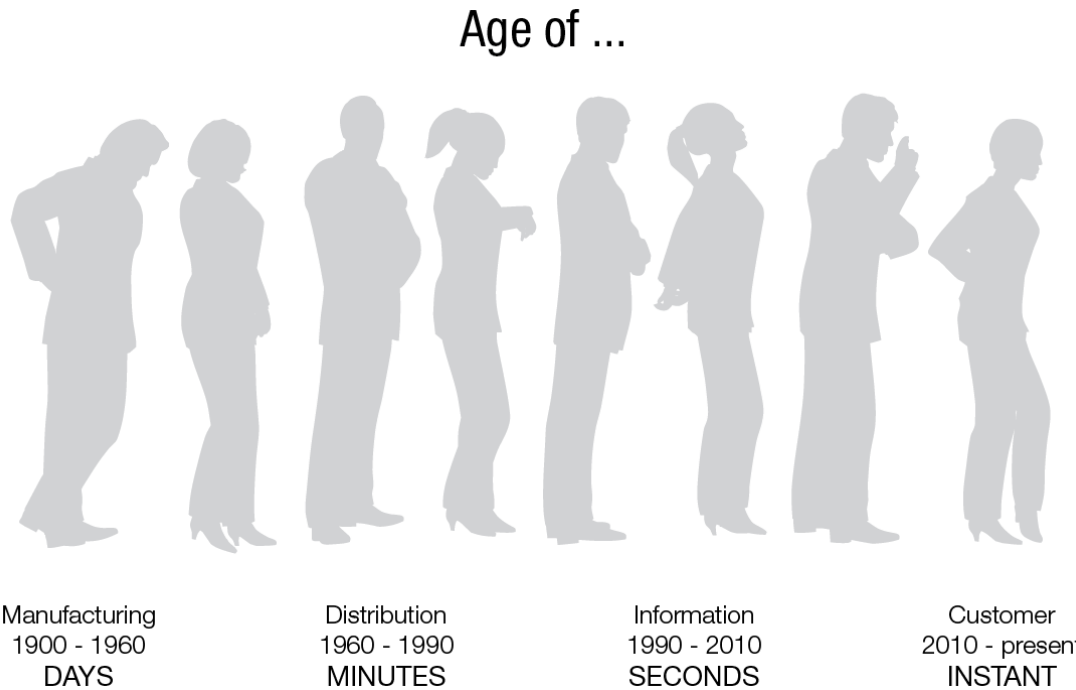
Watch this "Hear It Direct" video. What can you give your customers that they cannot get themselves? What information are you providing that they consider valuable?

The Age of the Customer Meets the Era of NOW

SLIDE #26

Today, speed, urgency, and responsiveness to our customer is critical. To deliver an elevated customer experience to customers in this age we need to set expectations and respond to them NOW!

Instructor:
Tell: *In the Age of the Customer, truth and honesty are more important than ever. We do not want to lose our credibility ever with our customers. When customers can find information on the Internet, we need to make sure we do our research and our facts are correct. We need to hold the knowledge and information around their real estate transaction.*



Source: Forrester, 04/2014

Today's customers are more informed. They are able to research and find the information they need on the Internet quickly. More than 88 percent of customers start their home buying search on the Internet.

Instructor:

Ask: How are KW technology solutions already helping you provide

Tell: *It is not good when you do not have any reviews online. We cover more on reviews in Chapter 4 - Survey.*

SLIDE #27

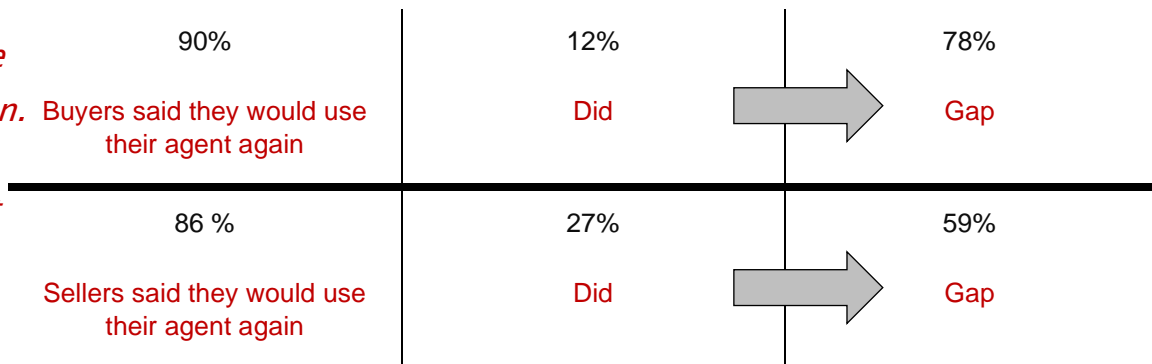
The Value of the Customer

Instructor:

Tell: *It's the agent's responsibility to get these numbers up. This is a missed opportunity if the experience doesn't happen. Fill the gap! That should get your attention.*

If you do not realize the value of repeat and referral customers, you are missing the boat. A customer who becomes a client for life and provides repeat and referral business is golden! According to the National Association of Realtors (NAR):

- The average person moves on average every ten years, with an average home price of \$259,100.
- The typical realtor earned 29 percent of their business from repeats and referrals.



SLIDE #28

Before you walk through this table, ask what the average price is for the area, and compare these national averages to local averages. Ask for some aha's.

20-Year Value of a Single Customer

Value of a Customer over 20 Years			
Year	Transaction	Price	3% Commission
1	1 st Home Purchase <i>NAR average home price</i>	\$259,100	\$7,773
10	1 st Home Sale <i>30% increase</i>	\$336,830	\$10,105
	2 nd Home Purchase <i>25% increase</i>	\$421,037	\$12,631
20	2 nd Home Sale <i>30% increase</i>	\$547,348	\$16,420
	3 rd Home Purchase <i>25% increase</i>	\$684,185	\$20,526
Total Value			\$67,455

In this example, the calculations are based on a 3% annual appreciation and 3% average commission. According to NAR, the median home price in 2018 was \$259,100.

SLIDE #29

Activity: Lifetime Value of a Customer

NAR tells us that, on average, people live in their homes for 10 years. So, on average, throughout their lifetime, people will buy 3–5 houses, assuming they buy their first one at age 25.

In addition, if you're indeed offering superior customer experiences for your customers and you're asking for referrals, your clients should provide you with a referral at the rate of at least one per year.

Now translate this to your business. Using the values you entered for your Pre-work, complete the following table.

Lifetime Value of a Customer				
Year	Age of Client	Transaction	Your Average Sales Price	Your Average Commission
1	30	1 st Home Purchase	\$	\$
10	40	1 st Home Sale	\$	\$
		2 nd Home Purchase	\$	\$
20	50	2 nd Home Sale	\$	\$
		3 rd Home Purchase	\$	\$
30	60	3 rd Home Sale	\$	\$
		4 th Home Purchase	\$	\$
What's the value of one of your clients over their lifetime?				\$

Instructor:
Allow participants time complete the table. It's a powerful eye opener!

Note:
Example can be adjusted to the market you are in.

Tell: *The customer is more than a single transaction, more than one commission. It's 3x, 4x, or 6x when the customer feels they have a great experience with you.*

Instructor:

Tell: We are not saying it's about the money. It is about the value, we provide, if we provide value the rewards are significant!!!

Ask for some aha's.

Instructor:*Allow**participants**time to**complete the**table.*

Tell: *This is the potential of sustaining the customer relationship and delivering a memorable experience. There needs to be consistent touch-points and the experience has to be at a high level.*

SLIDE #30**Activity: Value of Your Database**

Now determine the value of all the customers in your database using the NAR (2018) statistic for repeat and referrals for the typical realtor earned 29 percent of their business from repeat clients and customers and 29 percent through referrals from past clients and customers.

Step	Transaction	Example	Your Result
A	Number in Your Database	1000	
B	Average for Repeat (A x 29%)	290	
C	Average for Referrals (A x 29%)	290	
D	Total Repeat + Referral (B + C)	580	
E	Value of One Client (from previous table)	\$67,455	
What's the value of your database? (D x E)			\$

And, what if ...

Is your repeat and referral rate greater than 29 percent?

You get one referral each year from your clients?

Instructor:**Ask***participants to**complete the questions.**Point out the**last sentence**on this page.**Ask for some aha's.*

You get more than one referral each year from your clients?

Whatever you calculate is a minimum. This is because if you are staying in relationships and top of mind, every referral will buy more properties and refer more customers to you.

Why Customers Need Us!

SLIDE #31

Customers want a professional and productive agent. They want someone they can trust, who is reputable, knowledgeable, proactive, and communicates well. In today’s busy world, they do not have the time or knowledge to handle the real estate transaction on their own.

They need you and count on you. Investing in a home is one of the biggest investments people will make in a lifetime. Agents need to give buyers and sellers what they want and more!

Buyer	Seller
Help finding the right home – 52%	Help marketing the seller’s home to potential buyers – 20%
Help negotiating terms – 14%	Help pricing the home competitively – 20%
Help with price negotiations – 11%	Help selling the home within a specific timeframe – 19%
Price of comparable homes – 6%	Help finding a buyer – 14%
Help with paperwork – 6%	Help sellers find ways to fix up the home to sell it for more – 14%
Tell me how much I can afford – 4%	Help with negotiations and dealing with the buyers – 6%
Help with financing – 2%	Help with paperwork/ inspections/ preparing for settlement – 4%
Help teaching buyers about neighborhood in the area – 1%	Help sellers see homes available for purchase – 2%

Source: NAR 2018

Instructor:

Ask: *How do you structure your Value Proposition around this?*

Instructor:

Tell:

Customers can pick any agent.

How do you stand out?

What makes you unique?

Why should they pick you?

Tell: Focus on the top five—this is what customers need from their agents.

Tell: The agent of today must know more than the customer—even though today’s customer knows a lot!

SLIDE #31

What Customers Look For In an Agent

Instructor:

...

Tell: *Again, focus on the*

Listed below are the most important factors customers are looking for in an agent.

top five—this is what customers look for in an agent.

Are these included in your Value Proposition? We will talk more about our Value

Proposition at the end of this chapter and again in Chapter 2.

Buyer	Seller
Agent is honest and trustworthy – 19%	Reputation of agent – 31%
Agent experience – 17%	Agent is honest and trustworthy – 19%
Reputation of agent – 17%	Agent is a friend or family member – 15%
Agent is a friend or family member – 15%	Agents knowledge of the neighborhood – 13%
Agents knowledge of the neighborhood – 8%	Caring personality/Good listener – 4%
Caring personality/Good listener 7%	Agent’s commission – 4%
Timely with responses – 7%	Association with a firm – 4%
Agent is 100 percent accessible because of technology – 4%	Agent is 100 percent accessible because of technology – 3%
Association with a company – 2%	Professional designations held by agent – 1%
Professional designations held by agent – 1%	

Source: NAR 2018

If the factors listed in the table above are what customers are looking for, how do you let them know that you not only meet those factors, you exceed them?

The customer wants to know “what’s in it for me?” What can you offer him or her that another agent can’t? Why should they choose you?

Know Thyself

There are two parties in this important relationship—the customer and *you!*

What unique value do you bring to your customer, and why would they choose you over another agent?

In order to provide an exceptional experience to your customers, you need to begin with a thorough understanding of yourself.

What's Your Story?

Imagine your customer is at a party, talking about their recent experience working with you.

- What is the story they are telling about you?
- What story do you want them to tell?

SLIDE #32

What story do I want my customers to tell about me?

Instructor:

Tell:

If you are not clear on what you want your customers to say about you, you need to be!

SLIDE #33

Be Customer-centric

Instructor:

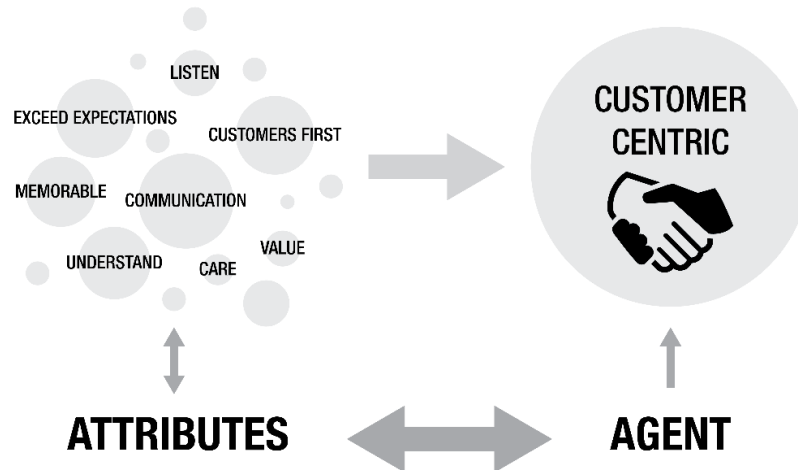
Twenty-first century customers are expecting personalized attention along with a proactive customer experience.

Ask:

Why is it so important to be customer-centric? How does this make your customers feel?

At Keller Williams, customers always come first. We are customer centric, and we strive to:

- Provide a customer experience that continually wows and delights the customer!
- Focus on our customers because they are why we are in business; they are at the core of what we do.
- Create and maintain relationships that grow our database.
- Establish customer loyalty and lifetime value, which creates referrals and repeat customers.


Instructor:

Tell: *This is a short video from Hear It Direct. This video leads us into the next section “Stay Relevant”.*

After the video, ask, *“Are you and your team staying relevant? How? Are you learning each client? How?”*

VIDEO
SLIDE #34



VIDEO
(2:41 MIN)

Agent Case Study

Watch this “Hear It Direct” video. How are you exceeding Real Estate expectations? Are you learning each client?

Stay Relevant

In order to stay relevant in this age of the customer, we must not only be in sync with our customers, but one step ahead in order to bring value to them. Listed below are three ways to stay relevant.

1. Know Your Market and Demographic
2. Know Preferred Communication Styles—yours and how to communicate with others
3. Know Your Value Proposition

1. Know Your Market and Demographic

How is knowing your market and demographic important to the customer experience? Why?

Instructor:

- *Example: It's your job!* _____
- *So you can relate to your customer and their wants and needs, that's your job.* _____

How can you learn more about your market and demographic so you can be **relevant** and add **value** to your customer?

- **Instructor:** _____
Example: *Get out there and look! Really study your MLS— be a student of the game. Read, study and preview properties.*

SLIDE #35
1 of 3

Instructor:

Tell: *Show your credibility and value!*

Ask
participants to report on their local current market and demographic. They should know this!

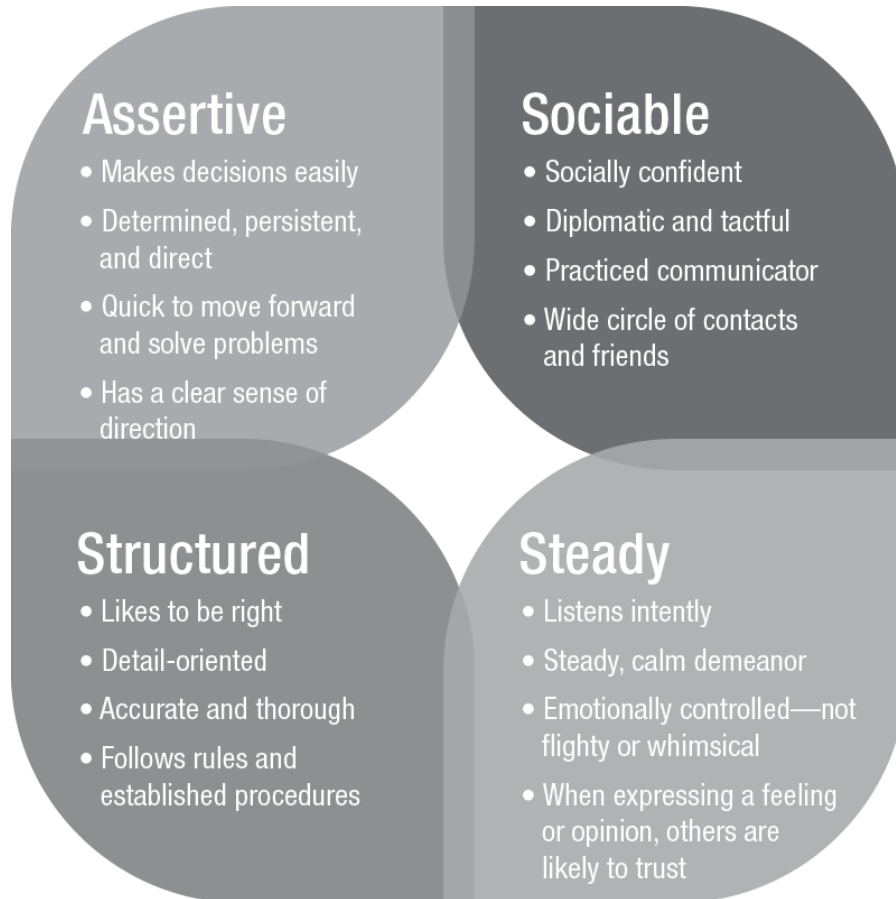
SLIDE #35
Click 2 of 3

2. Know Preferred Communication Styles

Instructor: 6
Tell: *Agents are typically Assertive or Sociable and yet most of the population of buyers and sellers are Structured and Steady. It's important to know their customers' styles and how best to communicate with them.*

It's handy to have a working understanding of communication styles so as to maximize communication between you and your customer.

Generally, people can be classified as one of four communication styles.



Once you determine a customer's style, you can then adjust your communication style to mirror him or her and gain rapport more readily.

What's your dominant communication style?

Instructor:

*Most agents are **Assertive** and **Sociable** or a combination. Many customers are not. Knowing your style and the customer's puts you at an advantage.*

Communicating with Customers

Complete the scenarios below:

<p>How would you approach a customer whose style you view as Assertive?</p>	<p>Instructor: <i>Fast, bottom-line Be prepared, fast, get to the point</i></p>
<p>How would you approach a customer whose style you view as Sociable?</p>	<p><i>Friendly, happy, social Listen!</i></p>
<p>How would you approach a customer whose style you view as Steady?</p>	<p><i>Calm, caring, sensitive Be prepared, remove drama</i></p>
<p>How would you approach a customer whose style you view as Structured?</p>	<p><i>Factual, process-oriented, detailed Give graphs, charts, processes, teach them one thing and they'll respect you</i></p>

What about communicating with a couple where one is I and the other is C?

Instructor:

Tell: *Here is a story by Bruce Hardie, Regional Director Northwest Region, Spokane, WA. Prior to a pre-listing appointment, he puts together a pre-listing packet in a basket for the potential customer. He has the basket delivered to them prior to the appointment. When he arrives for the pre-listing appointment, he asks if they received the basket. He can tell by their response to his question how he will approach and communicate with the customer.*

Style – Customer Response:

Assertive – *Thank you, it's over in the corner. I have not had a chance to open it yet.*

Sociable – *Thank you, Love, Love, Love it!*

Steady – *Thank you so much, I wasn't expecting it. You didn't have to.*

Structured – *Thank you, I looked it over in in detail.*

SLIDE #35
Click 3 of 3

3. Know Your Value Proposition

Instructor:

Your Value Proposition states in a few sentences exactly what you will do for your customer. You should always be prepared to present your Value Proposition. In the next chapter – Set, presenting your Value Proposition is the first step in setting expectations.

Tell:

In Chapter 2 –

SET, we will cover

“Set Expectations

in a Simple 3-

Step Process”.

The first step is

to present your

Value

Proposition.

Before you can

present your VP,

you need to know

and master it.

Let’s take a look

at what makes a

great VP.

Know Your Value

Proposition is an

introduction to

the importance of

knowing your VP.

Touch on it here

and go more in-

depth on the

importance of

your Value

Proposition in the

next chapter.



From *The Millionaire Real Estate Agent*

Top real estate agents always have a clear understanding of why they should be hired and they are able to articulate it to anyone at any time. For sellers, their goal is to net them the most amount of money, in the shortest amount of time, with the least amount of problems. For buyers, their goal is to find them just the right home, at the best price in the right time, with the least amount of problems. Great service begins with a clear purpose for why someone should work with you.

Instructor:

Share your own VP. Does it include customer experience?

Ask: *How many of you have a Value Proposition?*

Value Proposition Examples

Here are some examples from top agents. Are you able to identify what they will do for the customer?

We have built a full-service team specifically for consumers. For the same price as working with a normal agent, consumers can take advantage of buyer specialists, listing agents, a marketing department, transaction coordinators, telemarketers, inside sales, and virtual assistants.

Our goal is to be informative and helpful. We hope to earn your business with our exemplary level of service and extensive local knowledge of our area.

We use our expert advice, local neighborhood knowledge, and up-to-date market data to achieve successful real estate outcomes for our clients on a daily basis.

Here are some one-liners from these same top agents that quickly describe their business.

“Out to change the way you think about real estate.”

“Prompt and professional service is our guarantee.”

“We sell more because we do more.”

“Innovation, determination, and a cutting-edge team approach.”

Instructor:
Share Your VP.

Ask for someone to read through a couple of these examples.

Ask for participants to share their VPs.

Activity – Your Turn

SLIDE #36

Prepare to develop or refine your Value Proposition. Complete the following statements.

Instructor:

Tell: *Take 5 minutes to complete.*

Participants can refer back to what customers need and are looking for from an agent on pages 31–32 to help when defining and writing your value proposition.

Tell: *This allows you to be “purposeful.”*

I exceed expectations by:

I deliver an exceptional experience for my customers by:

My personal strengths are:

My teams’ strengths are:

Note: Refer back to the tables of what customers want and need on page 27 and 28.

SLIDE #37

“Top agents can easily explain what services they will provide to anyone who hires them; this is your Value Proposition.”

—THE MILLIONAIRE REAL ESTATE AGENT

Instructor:
Point out how their Value Proposition should include setting and exceeding expectations throughout the entire lifecycle for buyers and sellers.

Activity: Your Value Proposition

Break into groups of two or three. Take 10 minutes to role-play and practice your Value Proposition.

What is your Value Proposition for sellers?

What is your Value Proposition for buyers?

Instructor:
After they complete their VPs, have them break into groups of 2-3 to role-play and practice their Value Proposition.
Time: 10 minutes

For help writing and presenting your Value Proposition refer to KWU’s Lead Generation 36:12:3 course, Power Session 1: Building Validity and Positioning.

Ask: *After this exercise, ask for a couple of volunteers to share.*

Chapter Take-Aways

- Customers are your business's lifeblood. Treat them royally. Don't take them for granted.
- Customers are unique. Take the time to truly understand their feelings, motivations, wants, and needs.
- Customers are valuable. Get 'em and keep 'em!
- Stay relevant and up-to-date.
- Remain customer-centric—the customer reigns supreme!
- Know your Value Proposition!
- Understand the importance of having a CX system in place.

From Aha's to Achievement

AHA'S	<p>INSTRUCTOR: Examples: <i>Be the local economist of choice.</i> <i>Know your VP</i> <i>What are your Aha's?</i></p>
BEHAVIORS	<p><i>Communicate more often.</i> <i>Use customer needs analysis.</i> <i>What behaviors do you intend to change?</i></p>
TOOLS	<p><i>Post VP on website.</i> <i>Replace scraps of paper with systems!</i> <i>What tools will you use?</i></p>
ACCOUNTABILITY	<p><i>Get a coach.</i> <i>Put dates on getting it done.</i> <i>What does accountability for this look like?</i></p>



SLIDE #39

My CX System

Know Thy Customer

Chapter 1


 Tear
this
page
out

Portrait of My Customer Today

INSTRUCTOR:

Tell: You may tear this page out of your book. We will begin building your CX System. Also, don't panic, we have included this system in the back of this book.

Tell: This is the first page of your CX System. At the end of this course with the information, you provide at the end of each chapter, you should be able to put together your customized unique CX System and implement it into your business.

Tell:

Why does Customer Value matter?

Customers will remember the experience they felt during the transaction.

Having a reputation for taking good care of your customers is priceless, and it's the most effective way to validate your professionalism.

Satisfied customers provide the most powerful kinds of marketing—testimonials and word of mouth.

It's much more efficient and cost-effective to retain satisfied customers than to get new customers.

Ask:

What value do you bring to the customer?

INSTRUCTOR:

Allow a few minutes for participants to complete this page. Ask them for feedback and then move on to work on the next page.



My CX System

Know Thyself

Chapter 1

Tear
this
page
out

How will I incorporate delivering an exceptional customer experience in my Value Proposition?

Instructor:

Allow participants 5 minutes to complete this page.

Ask for a few to report out.

How will I take my Customer Experience from E to P?

Top real estate agents always have a clear understanding of why they should be hired.



CHAPTER 2:

SET

SLIDE #40

Instructor:

Timing for this chapter: 60 minutes 10:30 – 11:30

50 minutes +5 minutes for 2 videos +5 minutes for “My CX System” 14 pages

Purpose of this chapter: “Set” is the first step in the CX Five-S Model.

The importance of setting expectations with the customer is explained in this chapter. The goal is to set the proper expectations so there is congruency between where the customer is and where the agent is. The agent sets expectations they can meet and exceed: 1) Present Your Value Proposition, 2) Listen to Your Customer, 3) Seek Agreement—Come together, agree, and set mutual expectations.

Learn the difference between being functionary and fiduciary.

Take 5 minutes to complete “My CX System” incorporating Set Expectations.

Participants will share information and learn from each other.

In this chapter ...

Five-S Model: 1) Set, 2) Serve, 3) Survey, 4) Surpass, and 5) Sustain.

- Set Expectations
- Present Your Value Proposition
- Listen to Your Customer
- Seek Agreement

VIDEO
SLIDE #41

Set Expectations

1 Set

Instructor:

Tell: *This video leads us into "Set*

Expectations in a simple 3

step process". Point out the

3 steps can be included and

applied to either a buyer

or seller

SLIDE #42

consultation

do this now? What standards and systems do they have in place?

Tell:

Build a trusting relationship with your customer.

The first step of the Five-S Model in delivering a great customer experience is to set expectations at the beginning of the relationship. The goal is to set the proper expectations so there is congruency between where the customer is and where you are. Set expectations you can meet **and** exceed. Then communicate to your customer what you did.



VIDEO
(1:37 MIN)

Buyer Consultation

Watch this "Hear It Direct" video. Are these part of your regular practice? How do you make the most out of a consultation?

Set Expectations in a Simple Three-Step Process



Discussion

- Think of an expectation you would set with a customer.
- Think of ways you would exceed it.
- Now, how will you ensure your customer knows when you have exceeded their expectation?

Instructor: Tell: *Never assume the buyers and sellers know it's not their job – set expectations! And, then figure out ways to exceed them!*

1. Present Your Value Proposition

SLIDE #43

Instructor:
Tell:
We worked on our Value Propositions in Chapter 1, now we are ready to present it to customers with confidence. Customers have peace of mind when they feel you're taking care of them and communicating with them. Set expectations and communicate everything you'll be doing to bring value to them. Present this to them through your VP. This is your time to shine in their eyes.

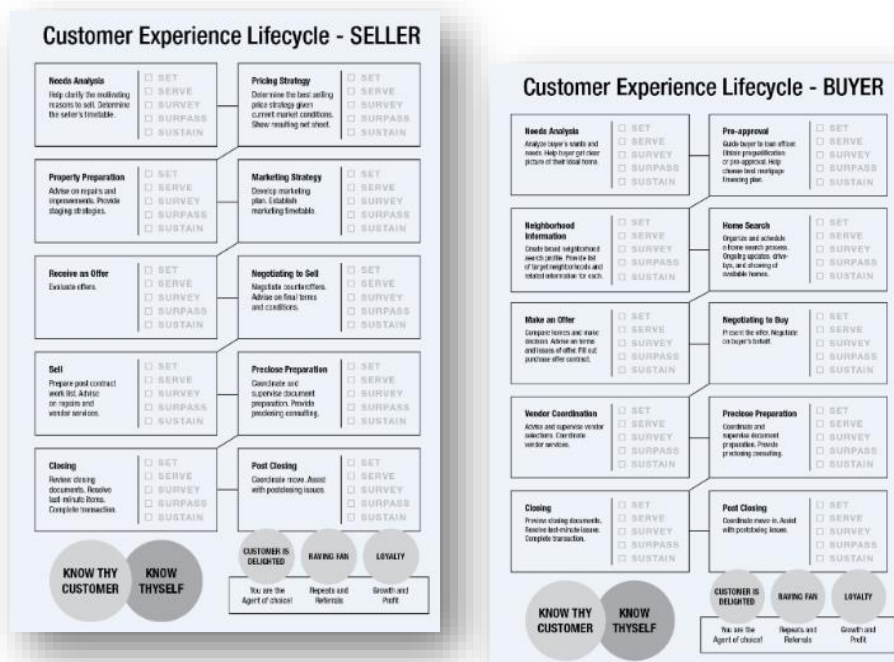
During the critical first appointment with a new customer, you have the opportunity to shine while you present your value proposition and ask for confirmation and agreement.

You worked on your Value Proposition (VP) in the previous chapter. Communicate this up front clearly and confidently. Give the customer a copy of your VP or show it on your iPad or tablet.

All Customers Want Peace of Mind

All customers want peace of mind. Communicate everything you will be doing to bring value to the relationship. Set your expectations up front.

- Share your personal record of accomplishment include third-party testimonials.
- Offer service guarantees.
- Provide timely and systematic updates.
- Remind them you are their partner in this relationship; treat them as you would treat family.
- Focus on the 10-service areas (CX Lifecycle) walk them through every step of the CX lifecycle while setting expectations.



Note: CX Lifecycle job aid is located in the appendix.

Explain Functionary vs. Fiduciary

Instructor:

Tell: *Throughout our relationship with our customers, KW Agents always act as a true fiduciary.*

Explain the difference between “functionary” and “fiduciary” and why it’s important that you provide fiduciary service.

Highlight the differences while supplying the answers to Fiduciary. Remind them this is part of the experience we want to deliver to customers.

As a Keller Williams agent, act as a true fiduciary—place your client’s interests ahead of all others, even your own. Fiduciary service is the highest quality of service you can provide. The fiduciary agent abides by the legal requirements placed on them by their profession and treats all their clients with great fiduciary care. This is the difference between an average and an exceptional experience.

Functionary	Fiduciary
Tells and Sells	Serves, Educates, and Guides
Responds to Needs	Anticipates Needs
Assumes Little Responsibility	Accepts High Responsibility
Completes the Task	Owens the Result
Delivers Information	Advises and Consults
Meets Expectations	Exceeds Expectations
Replaceable	Irreplaceable
Low \$	High \$\$\$\$\$

What are some ways you can ensure that you are acting as a fiduciary?

Position Yourself as a Trusted Information Resource

Position yourself as the “go-to” person for all of your customer’s real estate-related information.

Educate the Customer on the Process and What Comes Next

Even though more than 88 percent of customers can find information on the Internet, they still count on you to educate them and help ease their minds. Be proactive and always let them know what to expect next. Be prepared to consult the customer on ...

- The buyer and seller process
- Financing
- Community information
- Schools
- Vendors
- Your availability
- How and when you will communicate with them
- What is going to happen next

Today’s customers expect to have a competent agent who is educated, knows the market, and will protect them in the biggest financial decision in their life.

When You Don’t Have the Answer

Have a network of knowledgeable people who can provide the very best answers when you are not sure of something. When you are asked a question you don’t have an answer to, your response should always be:

SCRIPT:

“I’m not sure, but I can find out and get right back with you. Does that work for you?”

When you deliver the answer, credit the source, and your customer will trust you to meet their needs.



Of Course I Know What My Clients Want!

Watch this “Hear It Direct” video. Are you asking or assuming?

Instructor:

Tell: *This video leads us into “Listen to Your Customer”*

Instructor:

Tell:

End every

conversation with what will happen next.

Ask:

What other information do

you want to deliver as the

trusted

information

resource to enrich your customers’

experience?

Explain how important an agent’s.

Knowledge is to their customers.

Customers need to trust their

agents. The customer

“expects” you to get the answer.

VIDEO SLIDE #44

SLIDE #45

2. Listen to Your Customer

Instructor:

Tell:

It's important to know their needs and wants so you can meet and exceed their expectations.

Customers have their own expectations, setting expectations is the greatest thing you can do to create

an experience, show the level of service you provide.

Point out the importance of a thorough Needs Analysis to get at the heart of the customer's needs and wants. All too often we assume.

It's one thing to talk to your customer; it's another to listen. The second component of setting expectations is listening to your customers so you truly and thoroughly understand their needs and concerns.

TRUTH

People don't care how much you know until they know how much you care.

Always "**seek first to understand.**" Pay attention to:

- **What** they say.
- **How** they say it.
- **What** they mean.

One of the biggest mistakes agents make during presentations is not really **listening** to the buyer or seller and not really **hearing** what customers say or mean. Listening does not just occur after you ask something.

Prepare an Awesome Needs Analysis

All customers are unique they have had different experiences throughout their lifetime. Their wants and needs are different. How they perceive an experience is different. Learn and understand all you can about your customers through your Needs Analysis.

You'll need a great Needs Analysis system for both buyers and sellers to make sure you ask all the questions and get all the answers.

Instructor:

You'll have the answers when you ASK!

Tell: *Remind them, customers need to "feel" you are taking care of them! It's about the experience.*

Ask – Uncover – Customize

Asking probing questions becomes critical to helping customers clarify their thinking.

- Help the customer articulate their own expectations.
- Respond to any surprises or issues immediately—meet them head-on.
- Clarify their needs with follow-up questions.
- Probe three questions deep to uncover their real wants, needs, or expectations.
 1. **Ask:** Is there anything else you'd like me to know?
 2. **Ask:** Why is that important to you?
 3. **Ask:** On a scale of 1–10, 10 being highest, how important is that to you?

Instructor:

Tell: *Go Three* Example – Three-Questions Deep

Questions
Deep.

SCRIPT

The following
is from Dianna
Kokoszka's
Power Hour
video:

Ask the
question, ask
another
question about
that, and ask
another
question about
that ...

Where are you moving?

How soon?

Why is that important to you?

Why will that do for you?

What will that ultimately do for you?

What are you looking for in a new home?

Why is a large yard important to you?

What will that do for you?

What will that ultimately do for you?

“Great selling is about asking great questions, listening intently, and approving their responses.”

– Dianna Kokoszka

What will that **Ask for Preferred Communication Method**
do for you?

The customer
will start
telling you
their feelings.

The number one complaint customers have is that they do not get enough communication from other agents. We do not communicate the same with everyone so customize it for each customer.

Logic makes
them think and
emotion
makes them
act.

- **Ask:** How would you like to be communicated with and how often?
- **Ask:** Do you prefer a face-to-face update, phone call, email, text, or other?
- **Ask:** How often would you like to hear from me?

Even if a customer says they prefer text, ask if it's okay to call them when you have news. Then use both.

Instructor:

Tell: *Communication is so important when creating an exceptional customer experience for your customer; it can be the difference of a delighted customer vs. an unsatisfied or disappointed customer.*

What Is Your Needs Analysis

Instructor:
Ask
*What is your
Needs
Analysis
process?*

*If time
permits, ask
someone to
share.*

Do you and your team use it with every customer?

- _____
- _____
- _____

What tool(s) do you use?

- _____
- _____
- _____

Note: There are Needs Analysis questionnaires in both the buyer and seller presentations available on KWConnect.com.

SLIDE #46

3. Seek Agreement

Instructor:

The third component of setting expectations is to seek agreement with your client. You've made your complete presentation, you've listened to their needs and concerns, and you're ready to agree and get a contract signed.

Tell:

Seeking

You want to abide by your standards AND satisfy the customer's wants and needs. The most effective method is to honor your established service program combined with a flexible service attitude.

Agreement is asking instead of assuming.

Come together, agree, and set mutual expectations.

Win-Win?

Watch for reactions from your customers as you get through the process of setting expectations. What vibe are you getting from them? Is there a connection?

1. Do you "feel" there can be a relationship?
2. Do you have rapport with each other?
3. Can you meet their needs and expectations?

Yes: If the answer to any of these questions is yes, it is a **win-win**.

No: If the answer is no ...

- Explore further by inquiring about their understanding and expectations.
- Always come from curiosity, because you may have made assumptions or not addressed their concerns well enough.
- If the connection still doesn't feel right, do the next best thing and refer the customer to another agent. This prevents future frustration for you and the customer and still ends in a win-win.

Activity: Set Expectations

1. Read the following post that was actually posted on the Internet by a homebuyer.
2. Form groups of 3–4 to discuss the questions listed at the end of the post.

Buyer agent relationship after closing on the house?

Folks, I had an agent from (blank) who was assisting me in buying my house. When we hired her, she promised all kinds of things, and after closing, she disappeared. She would not answer our emails or return our calls. It made us feel like she was only there to get the commission.

She told us she was an A-class agent. My question is, is the buyer agent supposed to be like this?

Instructor:
Tell:
This is from a real Internet post—word for word.

Ask
participants to read the following true post from a buyer and answer the questions.

ASK: *How common is this story?*

Set Expectations ...	
How would Setting Expectations using the simple Three Step Process 1)Present your Value Proposition 2) Listen to Your Customer 3)Seek Agreement prevented this from happening?	
If this was you or your buyer’s agent, what actions would you take?	

SLIDE #47

Chapter Take-Aways

Set expectations by doing the following:

- Present your Value Proposition.
- Deliver value.
- Prepare an awesome Needs Analysis.
- Be a fiduciary.
- Listen to your customer.
- Seek agreement.
- Come together, agree, and set mutual exceptions.

Instructor:

Ask

*participants
for aha's.*

Instructor:

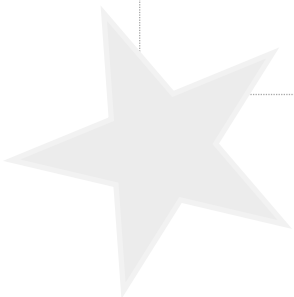
Allow

*participants
5 minutes to
complete the
following
page—for
their "My CX
System".*

Ask: *for a
few to report
out.*

From Aha's to Achievement

<p>AHA's</p> <p><i>What are your Aha's?</i></p>
<p>BEHAVIORS</p> <p><i>What behaviors do you intend to change?</i></p>
<p>TOOLS</p> <p><i>What tools will you use?</i></p>
<p>ACCOUNTABILITY</p> <p><i>What does accountability for this look like?</i></p>
<p>ACHIEVEMENT</p> <p><i>What will you achieve?</i></p>



My CX System: 1 Set

SLIDE #48



Chapter 2

How will I set and exceed expectations for my customer in each step of the CX Lifecycle? (Complete the table below with expectations you'll set and exceed.)

	Buyer	Set Expectations	Exceed Expectations
1	Needs analysis		
2	Prequalification or preapproval		
3	Neighborhood information		
4	Home search		
5	Making an offer		
6	Negotiating to buy		
7	Vendor coordination		
8	Pre-close preparation		
9	Closing		
10	Post-closing		
	Seller	Set Expectations	Exceed Expectations
1	Needs analysis		
2	Pricing strategy		
3	Property preparation		
4	Marketing strategy		
5	Receiving an offer		
6	Negotiating a sell		
7	Selling		
8	Pre-close preparation		
9	Closing		
10	Post-closing		

My Customer Experience System



CHAPTER 3: SERVE

SLIDE #49

Instructor:

Timing for this chapter: 60 minutes 11:30–12:30

55 minutes No videos +5 minutes for “My CX System” 26 pages

<<Lunch 12:30 - 1:00>>

Purpose of this chapter:

“Serve” is the second step in the CX Five–S Model. Do what you say you’re going to do, and do it well with standards, technology, and people (team and vendors). Customers focus on outcomes and the experience. Serve is critical to delivering a great customer experience.

In this chapter, it’s time to think service. Participants will develop and set standards within the CX Lifecycle and incorporate them into their business.

In this chapter ...

Five–S Model: 1) Set, 2) Serve, 3) Survey, 4) Surpass, and 5) Sustain.

- Serve the Customer
- Do What You Agreed To and Do It Well
- 1. Have Standards
- 2. Leverage Technology
- 3. Leverage People

Serve the Customer Serve

Instructor:

Tell:

Always tell the truth and do what you said you would do. Deliver and exceed it!

Time to think service!

The second step in your CX system is all about serving up what you said you'd do, and doing it well. Since customers focus on outcomes and the experience, this step is critical to delivering a great customer experience.

At this point, you have explained what services you will provide anyone who hires you—your VP—and you and your customer have agreed on expectations. Now you must ...

- Do what you agreed to
- Do it well

SLIDE #50

Instructor:

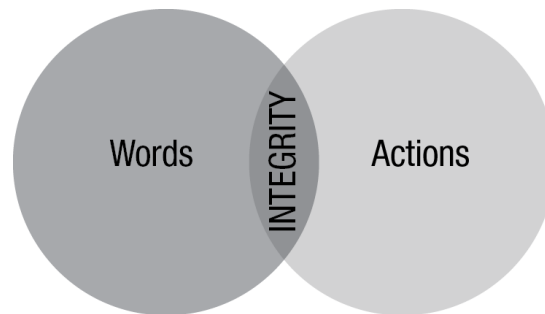
Ask:

Why is building a professional relationship and having rapport with your customer important to building trust?

Trust and Integrity

The only way to create referral and repeat business is to build and reinforce a trusting relationship with your clients. You build trust by following through on everything that you promise and realize that when you fail to follow through, you have undermined the trust you have with them. That's a big deal and you have to work to restore that trust, because people do business with those they trust.

Integrity is upholding your service promise and doing what you say you'll do.



TRUTH

Your integrity is challenged every time you fail to deliver on what you say you will do.

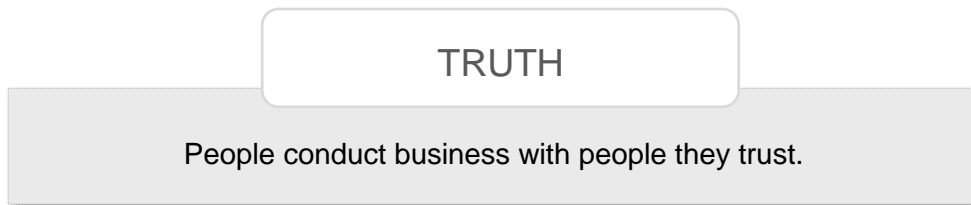
Ask:

How easy is it to lose trust?

Do What You Agreed To and Do It Well

Do What You Agreed To

Doing what you say you'll do sounds simple, yet it takes having a system of checks and balances in place to ensure that everything gets done to satisfy the customer. This is what builds a bond of trust between you and your customer.



Do It Well

Doing what you said you'd do and doing it well go hand in hand. Doing your job well involves having **standards** which can be measured, using **technology** effectively, and **leveraging** team members and vendors.

1. Have Standards
2. Leverage Technology
3. Leverage People

Instructor:
Tell:
Give an example of a time you agreed to something and did it extremely well, and your customers were delighted. Deliver and exceed it.

SLIDE #51

Point out the CX is not only with you but also the experience your customers feel working with your team members, vendors, etc.

SLIDE #52

Instructor:
Stress the importance of having standards to measure yourself and your team on how your standards allow you and your team to grow and deliver an experience your customers will tell everyone about!

1. Have Standards

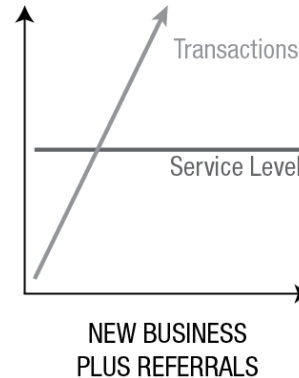
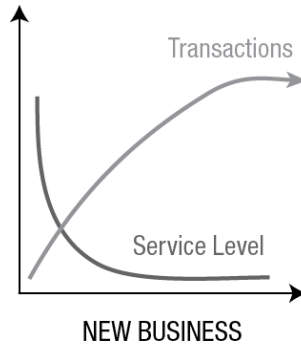
MYTH

My clients will only work with me—only I can deliver quality of service.

TRUTH

“Your clients aren’t loyal to you; they are loyal to the standards you represent.” – *The Millionaire Real Estate Agent*

A standard is the yardstick of your performance, and like a yardstick, it is a measure of how well you’re performing.



SLIDE #53

Tell a personal example, of your standards in a place of business you go to. For example, the dentist, doctor etc.

Your standards define your service and should directly affect the level of customer experience you provide. Hence the phrases:

- “We have high standards”
- “That meets our standards”
- “That measures up to our standards”
- “They have low standards”
- “That is below our standards”
- “They have no standards”

Communication Standards

Communication is a factor that customers will be quick to judge. They seldom feel they get too much communication. In fact, one of the most common complaints is they are not getting enough.

Proper and timely communication allows you to do the following:

- Provide a strong foundation for a sustaining relationship.
- Set and manage expectations proactively throughout the transaction.
- Create peace of mind for your customers.
- Demonstrate your professionalism.
- Enhance your credibility.
- Gives customers peace of mind.
- Increase the likelihood of success.

Share Standards with Your Customers

Share your standards and time lines so your customer knows what and when things are going to happen. Consider creating two checklists for your customer:

1. For *your* expected actions
2. For *your customer's* expected actions

Ask them to sign their commitment to the checklist up front on the things they will have to do to complete the transaction. This will give you power and accountability. This will also make your job easier to get them to do things they might not otherwise be motivated to do.

Ask your customers to mark a task off the checklist during your weekly communication. Share and communicate your progress to enhance customer perception of your service. Keep detailed records about your customers and your communications with them.

You can train your customers, or let them train you!

SLIDE #54
1 of 3

Instructor:
Tell: As we learned earlier, how you communicate standards are one way customers judge agents. Emphasize how important these standards are to create an exceptional experience and provide value!

Also, share how important it is to communicate your standards with the customer. For example: You create peace of mind.

Four Simple Communication Rules

Instructor:

Tell:

Point out #4, never ever put off bad news. When there is a problem, run to it! Always focus on solutions.

1. **Tell** them what you're going to do. Provide peace of mind.
2. **Ask great questions.** Keep quiet and really listen to the answers.
3. **Communicate weekly** and when something significant happens. Keep them informed.
4. **Never, ever put off bad news.** Get it over with quickly, and move on to problem solving.

Response Time

Tell: *The number one complaint is lack of communication!*

This should get your attention!

According to a study conducted by the California Association of Realtors in 2014, only half of buyers surveyed indicated that their agent's response time surpassed or exceedingly surpassed their expectations. Which means that half felt the agents was slow to respond.

Buyers and sellers frequently complain about:

- Agents that do not educate them on the process of the real estate transaction
- Agents not responding to their communication in a timely manner

Instructor:

Ask:

What kind of response times do you or your team have as a standard?

Ask:

What does this do their experience?

What is your standard for response time for buyers and sellers?	
Have you ever lost a customer because you did not respond fast enough?	
What did you do?	

How Is Your Message Received?

Communication is greatly affected by the words we use, our tone of voice, and our body language. In fact, how you say something and what you're doing while you say it can have a far greater impact than what you actually say. We think about our communication message, but we don't always think about how our customer receives our message.

There are three main components of how someone receives your message:

1. **What you say**—the words you use.
2. **How you say it**—your tone of voice.
3. **What you're doing while you say it**—your body language.

Be conscious and aware of nonverbal messages like eye contact, gestures, and appearance.

When Communicating by Phone

When talking on the phone, **tone** of voice becomes much more important, since your customer will not have any nonverbal cues to help interpret your message.

Many experienced agents practice smiling while they are talking on the phone, or they stand up, which helps keep them focused and their energy up.

Never end any communication without letting the client know what is going to happen next.

- _____
- _____
- _____

Instructor:

Ask: *How important is how you say it, tonality?*

Ask:

Study your energy in the mirror, do you come across as:

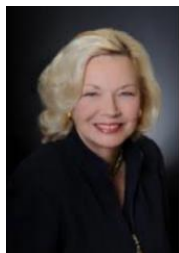
- 1. Friendly?*
- 2. Caring?*
- 3. Energetic?*
- 4. Experienced?*
- 5. Other?*

When Communicating by Email

Instructor:

Ask:

What else when communicating by phone and email?



Monica Reynolds, in Encinitas, California, is known for having a system for every process.

She says, “Emails are not conversations. It is not a contact. Relationships are built on conversations. No one is going to call you and say, ‘Your emails were fabulous! I would love to have you list my house again.’ It does not happen!”

Tell:

Try making a call for no reason.

- When you type in all-caps, your email comes across as shouting.
- Edit your messages before sending them. Use spellchecker, etc.
- Reply with caution; be careful who you are “replying” to. Avoid hitting “reply all” before double-checking who is listed.
- Keep it brief.
- Watch your tone. Keep it positive.
- Include your signature that includes all your contact information.

Instructor:

Discuss “no problem” and why “my pleasure” is preferred.

“No Problem”

When responding to customer thank-yous, how do you respond?

- **“No problem”** evokes ... nothing. They know that doing your job is not a problem.
- **“You’re welcome”** is polite and preferred over “no problem.”
- **“My pleasure”** evokes a positive feeling and a sense of appreciation.

Ask:

What other companies are known for saying “my pleasure”?
The Ritz–Carlton

Personal Touch Is Powerful

Never underestimate the power of the personal touch.

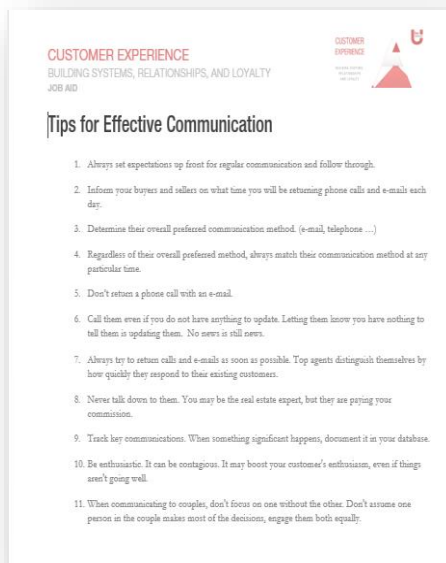
1. Send appropriate thank-you notes, either handwritten or email, as often as you can during and after the transaction.
2. Carry thank-you notes with you. Write them during any downtime you have.
3. Convert some of your impersonal communication (forms, etc.) by inserting a quick, uplifting note or applicable comment. This will personalize the message for your customers.
4. Show that you care!

Writing a personalized comment doesn't have to be that hard. A few uplifting words and your signature is all that is required. Many agents use a Sharpie or magic marker so that a note card is "filled up" with just a few words.

Communication Preferences

Younger buyers tend to place higher importance than older buyers on agents' communication via email and text message, while older buyers place higher importance on personal calls.

Source: *realtor.org*



Download "Tips for Effective Communication" Job Aid from the course toolkit on KWConnect.com.



Communication Preferences Vary

Instructor:
Discuss why it's important to understand generational differences. Tell a personal story if you have one about a mistake or success you had with this.

Keep in mind how customers prefer to be communicated with—treat others in the way that they wish to be treated.

You'll probably communicate to a baby boomer accountant in a different way than you would a Gen-X professional skateboarder customer.

Always pay attention to who you're communicating with. The truth is that they will give you cues to how they want to be communicated with.

Customers have differing communication preferences based on:


1. **Generational** differences (what stage they're at in their lives—baby boomers, Generation X, etc.)
2. **Cultural** differences (where they are from—their heritage and traditions).
3. **Communication** style (the way they prefer to behave and have others behave with them: Assertive, Sociable, Steady, Structured)
4. **Learning** style (the way they prefer to receive information: visual, auditory, kinesthetic, or some combination).

Be aware of these preferences and adjust your communication accordingly.

Ask: *Are you checking in? What's your process?*

CUSTOMER EXPERIENCE
 BUILDING SYSTEMS, RELATIONSHIPS, AND LOYALTY
 JOB AID

CUSTOMER EXPERIENCE
 BUILDING SYSTEMS, RELATIONSHIPS, AND LOYALTY



Generation Communication

Generational Differences in Home Purchase Process					
	Millennials (19-33 yrs. old)	Gen X (34-48 yrs. old)	Younger Boomers (49-58 yrs. old)	Older Boomers (59-67 yrs. old)	Silent Generation (68-88 yrs. old)
Home Search Method (Internet vs. Real Estate)	Internet	Real Estate	Real Estate	Real Estate	Real Estate
Search Time (Avg.)	12 weeks prior	12 weeks prior	12 weeks prior	10 weeks prior	8 weeks prior
Tendency to buy in Foreclosure	High to Low tendency to buy a Foreclosed property as age increases				
Internet Usage in home buying process	High to Low frequency of Internet Usage as age increases				
Mobile Device Usage	50%	50%			
Found Final Home Via Mobile Device	26% of Mobile Users	22% of Mobile Users	Not Specified	Not Specified	Not Specified
Home Buyer Satisfaction	Low to High Satisfaction as age increases				

Did You Know?

- Millennials are the largest cohort after baby boomers consisting of 77 million of the U.S. Population (Nielsen, 2014. NARs 2015). They are expected to surpass baby boomers in spending power by 2018 (Barron's, 2013) with a projected future spending volume of \$1.3 trillion on home purchases and \$600 billion in home rentals (Demand Institute Survey Research, 2013)
- Approximately 3 out of 10 have already purchased their first home in 2010 (Kiplinger, 2010) and will be doubled to 6 out of 10 in 4 years (NARs, 2014).
- 64% of millennials say it is "very important" to own a home and almost all millennial renters (84%) plan to purchase their first house in near future (US News Money, 2014).

A comparison made by National Association of Realtors 2014, shows that how generations differ in their home search process.

Download "Generation
 Communication" Job Aid from
 the course toolkit on
KWConnect.com.



Mindset and Image Standards

How you feel, think, and act—your mindset—is easily transferred to your face and body. For example, when we’re sad, we may tend to frown. When we’re happy, we smile and laugh more readily. These emotions carry over to our customers and can create an uncomfortable feeling, even distrust.

Avoid bringing any negative thoughts or emotions from your personal life or business life. Treat each customer as if you’re excited and positive!

TRUTH

You never get a second chance to make a first impression.



Steve Chader; owner of The Chader Team, Keller Williams Integrity First Realty, and TCT Property Management Services; in Mesa, Arizona, says, “There is a distinct difference between a licensed agent and a professional agent. A professional agent delivers consistent performance, time after time, consistently high performance. Having a reputation for taking good care of your customers is priceless, and it’s the most effective way to validate your professionalism.”

Instructor:
Tell:
The important message here is that you are a professional every time you step out of your house! People will be observing you and judging you.

Professionalism Counts

A “first impression” encompasses the *entire* transaction—from first encounter through closed transaction, to follow-up after the sale and beyond. You have the ability to make a great impression and retain a customer for life.

Keep it simple, just be nice.

Discussion

What does professionalism mean to you?

Instructor:

Image

Ask:

What does your image look like Your image does matter, as people tend to form impressions quickly. How you look and how your workplace looks is important and impacts credibility.

on Facebook, your website, Yelp, and even your community, etc.?

- Maintain a professional look and dress appropriately.
- Remember, your workplace is not just your office— it also includes your car and any other place you do business with customers.
- Image is also defined by who you surround yourself with: your assistant, vendors, stagers, photographers, videographers, and so on.

Remember ...

Every impression you make counts!

Are your vendors meeting your standards and what does their image look and feel like to others?

Keep your mindset positive and your image sharp!

Are they meeting your customer's standards? How do you know?

Instructor:

Ask: *Does your image match your market? Does it match your customer?*

Tell:

Images matter ... "Paint to Your Market".

How many times a week do you check your signage? You should check it 2x a week. Your sign is your image too.

Enforce Standards

Just saying “*this is the service I intend to provide*” is not enough.

When you tell your customer what you’re going to do, remember how well you intend to provide service to them, based on your standards.

If you don’t enforce standards, you’ve wasted your time creating them in the first place. You cannot maintain a strong service culture unless you, and your team, are passionate about what you do and keep the customer as the focus. This is when everyone benefits!

Instructor:
Standards only work if they’re adhered to—always! Remind them to make sure they are enforcing their standards.

Examples of Standards

- Prior to showing clients a home, the agent must have seen it first.
- Within one hour after receiving a signed contract, reach out and call the client.
- Never hang up the phone without letting the client know what is happening next.
- Answer phone calls within _____.
- Return phone calls within _____.
- If calling on behalf of another agent, introduce yourself and say you are calling on behalf of ...
- When an issue comes up, get back to the customer within 24 hours.
- _____
- *Examples:*

- *Follow up on showings within 24 hours.*
- *Communicate with other agents.*

- _____

Instructor:
Ask for examples from their businesses. Give examples of your standards.

Notes

2. Leverage Technology

SLIDE #55

Technology does not replace the agent. Customers use the Internet and technology as tools to access and find information. Agents must accept and adjust to this trend and be where customers are. Ninety-five percent of buyers search for property using the Internet. Speed, urgency, and responsiveness to our customers is critical.

Keller Williams believes that real estate is about relationship between an agent and their client. That’s why we create technology that ensures these relationships will endure and grow, helping you shape your business into one that flourishes, one life-changing client experience at a time.

1. Command

More than a CRM, Command is a platform that puts you in control of your database, your business and your future. And because it was built hand-in-hand with agents, it’s designed to be used by agents.

2. Kelle

A powerful partner designed to enhance the agent experience. From organizing schedules to growing your referral network to expertly navigating other Keller Cloud technologies, Kelle gets it done.

3. KW Consumer App

An app that delivers a data and neighborhood focused experience to your clients – all curated and guided by you in Command and with the help of your favorite sidekick, Kelle.

Keller Cloud was built so that you can easily harness the collective datapower of the world’s largest real estate force in your business. It’s no-hassle, easy-to-use, and designed to uncover trends in the market as they emerge so that you are well-positioned to have more conversations, build deeper relationships, and grow your business.

Instructor:

Review the three technology solutions that Keller Williams has built.

Explain that Keller Williams is focused on building technology that’s smart and human, empowering you to be more and earn more.

Say:
The goal is to let KW technology solutions be the functionary so you can focus on being the fiduciary.

Kelle

Instructor:

Kelle is your personal assistant – without the vacations or coffee breaks. Leverage Kelle to easily:

Ask: *How many in the class have downloaded the Kelle app?*

- Grow your referral network
- Manage your database
- Find and add local insights
- Share neighborhood market reports on demand
- Ask questions
- Watch KWConnect on-demand training videos

Explain that Kelle is their personal assistant—allowing them to manage their database and accessing on-demand information—all while on the go!

Have participants download the app in class now!

Challenge them to complete either the KW Mobile App (next page) or Kelle challenge activity now.

Activity: Share a Kelle Snap

1. Open Kelle.
2. Say, “Find Kelle Snap for [ZIP Code/Neighborhood].”
3. Tap View Kelle Snap
4. Adjust the filters or neighborhood.
5. Tap the share icon.
6. Select the views to include and add a quick note.
7. Tap Share
8. Send the Snap to a contact.
9. Repeat this process for at least 10 customers by tomorrow!

KW Mobile App

Get the most accurate and up-to-date real estate information right at your fingertips. Show your customer how they can ...

- Easily connect with you and send property inquiries instantly.
- Draw a circle on the map or drop a pinpoint to search that area.
- See property details and full-screen photos, get driving directions, mark favorites, and create notes about what they liked, or share it with family and friends.
- Estimate their home loans with a free mortgage calculator.
- View open houses or rental properties in their area.

And most importantly, it's always branded to YOU!

Activity: Download KW Mobile App Now!

1. Download KW Mobile App to your smartphone or tablet now.
2. Share your branded app with your customers (at least 10 by tomorrow!).

Instructor:

Encourage associates to visit answers.kw.com for step-by-step instructions for branding their mobile app.

How will you communicate the release of the KW Consumer App to your customers when it's available?

Instructor:

Ask: How many in the class have downloaded the KW Mobile App?

Explain that getting your customers to download the KW Mobile App will put you ahead of the release of the KW Consumer App. The switchover will be as easy as an app update!

Have participants download the app in class now! Challenge them to get 10 people to sign up for their app as soon as they can after class (optional).

Website

Your website tells the customer a lot about you. Eighty-two percent of agents have a website. Make sure it is evident that you put customers first and that you bring value to their customer experience.

All agents need a website to do two things:

1. Allow clients to get to know them and the **unique value** they provide, as well as an easy way to contact them and refer business their way.
2. Make it easy for buyers to **search for properties** and to be compelled to provide their contact information to the agent.

How can you best utilize your website?

Instructor:

ASK: What else? _____

- Collect names by having a registration requirement.
- Tell viewers how to download your app.
- Keep your website fresh and up to date.
- Make an offer, like a newsletter, so they will leave their contact info.
- ~~Tells someone WHY they should be doing business with you.~~
- Include your Value Proposition.

Technology Summary

- Stay current with your technology tools.
- Be aware of the cost-benefit equation when you decide to upgrade your technology tools. Lead with revenue!
- Don't be dazzled by the newest fad on the market and overspend on technology that you might use sparingly.
- The best technology is the one you understand and will use.
- View your website or Facebook page in the eyes of your customer or potential customer.

Create an inventory of what you have and use on a regular basis, and decide which ones add most value to you. Always think, "How will this improve the customer experience?"

Instructor:
Stress these offerings from KW help them (the agent) AND, more importantly, help the customer—enhancing their experience.

Remind them that the Keller Cloud tools are available to them at no additional cost!

3. Leverage People

It takes a great deal of forethought and follow-through to serve your customer an excellent experience. This is where leveraging the help of your team, vendors, and allied resources really helps deliver an excellent customer experience.

Leverage Your Team

This can be done with a single point of contact, small teams, or large teams. Everyone needs to be on the **same page** and know their role to make sure your customer’s experience is something they rave about to others.

Standards for Teams

The ultimate goal is brand yourself and your team as the go-to for real estate knowledge. When you hire someone, create the following for them to work from:

- **Define the quality of service your team should provide.** When you hire someone, make procedural outlines, worksheets, and checklists the foundation from which they work from. This allows you to tightly define the quality of service they should provide.

Instructor:
Position your team. Use scripts, dialogue and personal touch!

What procedural outlines, worksheets, or checklists do you have in place?

How do these procedures help your team to serve your customers better?

*Instructor:
 This section is about utilizing a team and your vendors to serve your customers and provide value in exceptional ways. When you leverage people develop standards and systems to make sure they are delivering the CX to your clients that meet and exceed your expectations.*

Have participants complete the five questions on the next two pages. Then ask them to share with the class.

Instructor:

Ask for “Third Party

Endorsements and Reviews”.

An example is to put a system in place where once he or his team contacts the title company to let them know about a potential client, the title company sends the client a letter, with raving reviews of the agent.

Do you have something like this in place?

- **Create clear and written standards.** To enforce them, you must first know what your standards are. Your standards for everything you do should be clearly written down and clearly communicated to your team and/or vendors.

How do you communicate your standards to your team and/or vendors?

- **Practice what you preach.** You should emulate the standards yourself (your team watches you and will do as you do—good or bad!).
- **Inspect what you expect.** Periodically assess if they’re actually being followed. If you don’t enforce them, you’ve wasted your time creating them in the first place.
- **Provide recognition and rewards for excellent service.** You cannot maintain a

How do you know your standards are being used?

Instructor:

Inspect what you expect.

strong service culture unless your team is passionate about what they do and is rewarded for their successes.

What are some ways you reward others?

Standards for Teams

If you work with a team, your standards must be carried out and enforced by your team members.

1. **Set** measurable and achievable service **standards** for yourself and your team.
2. **Provide systems and training** to achieve those standards.
3. Measure standard attainment regularly.
4. **Reward** customer success among your team and recognize accomplishments.

Instructor:
Tie standards to systems and vice versa. Consistency gives people peace of mind, it's comforting to people.

Be Consistent

Provide a road map that will support you and others on your team so together you provide the same level of great service, and together deliver an exceptional customer experience.

- If you expect every member of your team to greet your customers in a specific way, give them a script. (“It’s a great day at Keller Williams ...”)
- If you have a standard way of doing a buyer presentation, document it so that your team can do **exactly the same thing**.



Steve Chader and his team have systems in place to support their standards.

Standard: Agent presents the buyer consultation to the client with the goal of leaving with a signed agreement.

System:

- Present buyer consultation.
- Educate the buyer on the buyer agreement.
- Ask for a signed agreement to represent the buyer.

If a team member does not want to work with their standards—for example, they skip the buyer agreement—they will not be a part of the team.

“Inspect what you expect.”

— GARY KELLER

Challenges for Teams

Instructor:

Incorporate systems and models, educate your team and communicate your standards during your consultations.

Sometimes customers believe they can only get the best service by working directly with you, the lead agent. Even though this isn't true, this could be a potential problem the agent and the team have to address up front when setting customer expectations.

Set expectations up front about how you and your team will communicate with the customer, to successfully dodge this issue and put your customer at ease.

Option 1: Pass the Baton (From: Monica Reynolds)

Educate the customer about each team member's expertise, then "pass the baton" to your team member. Let the customer know the next team member who will be in contact with them and why that team member is the right person for the job.

- Educate the customer about each team member's expertise.
- Give the customer reminders of your team.
- Your team member's role:
 - Remind the customer of the reason for the call.
 - Reiterate what happened in the last step.

SCRIPT

"Mr. Smith, now that we have an accepted offer, it's time for me to put you in the capable hands of our contract-to-close manager, Jack Doe. Jack joined us from a prominent mortgage and title company and he takes all of our customers through the closing process because he knows this so well. Jack will be contacting you at ___ time and will handle any questions of the closing process."

Instructor:

Ask: Who are people comparing you and your teams' services to? For example, once you have experienced the service at The Ritz Carlton that is now your benchmark. One of The Ritz Carlson Service Values that all their employees follow is:

I own and immediately resolve guest problems.

Whoever gets the problem owns it and follows it through, that is their standard.

Ask: What are some of your or your team standards?

Your Team Member's Role:

The baton receiver should:

- Remind the customer that the baton passer asked them to call.
- Prime the conversation by reiterating what happened in the last step.
- Never hang up the phone without telling the customer what is going to happen next.

SCRIPT

“Hello, Mr. Smith; this is Jack Doe. Jane asked me to give you a call now that you have an accepted offer ...”

It is important for the members of your team to clearly communicate where the team member is in the process and what happened in each step along the way. Maintain detailed records in your customer files.

Option 2: Create a Single Point of Contact

Another option is to institute a single point of contact whose primary job is to answer your customer's questions or concerns.

This could be your customer satisfaction coordinator who has access to all the files and is knowledgeable about every aspect in the transaction.

Even though this coordinator may at times have to get answers and call them back, customers like having a relationship with one person. They like a sense of continuity.

- Answers questions or concerns.
- Has access to all the files.
- Is knowledgeable about the transaction.

Ask Yourself

When you have others working for you, here are some questions you should ask yourself:

- Do I lead by example?
- Does my team have what they need to thrive?
- How am I motivating my team?

Instructor:
Hold a discussion on the pros and cons of having a dedicated team member for customer experience.

CEO

Consider the possibility of creating a position within your team of “CEO”—**customer experience officer**.

<p>What would the addition of a CEO do for your business?</p>	<p><i>Answers: Develop systems, standards, train, track, survey, report on customer experience, etc. Also, allow agent to focus on lead generation.</i></p>
---	---

Ask: *What can you assign to the CEO?*

Leverage Your Vendors

Your vendors’ performance and accountability should also reflect your standards.

1. Make vendors accountable to your standards. Only work and recommend people you trust.
2. Working with people you trust will remove 90 percent of potential problems. Make sure your recommended vendors follow your standards on returning phone calls within a certain time frame, etc.
3. Create a vendor coordination worksheet.
4. Set standards for communication.
5. Review vendors’ work for quality.
6. Get feedback from your customers on vendors’ work.
7. Revisit your vendors’ standards regularly.
8. Continually assess if your recommended vendors reflect your competence. As your business grows, your vendors’ business will have to grow as well to keep meeting your standards.



Peter Chabris says, “Everyone needs to be invested in our standards: the vendor, broker, title company, etc. They all have to understand what we are trying to achieve. We ask our vendors to sign our standards agreement because our CX is not only within our walls but extended through our vendors.”

Together ...



Activity – Vendor Standards Discussion

Complete the questions listed below.

How do you communicate your standards to your vendors?	
How do you hold them accountable?	
How do you get vendor feedback from your customers?	
How often do you review your expectations and standards with vendors?	

Instructor:
Discuss these questions.

SLIDE #57

Chapter Take-Aways

Instructor:

*Review take
aways.*

*Ask
participants
for aha's.*

*Ask them to
complete
answers to
the three
questions.*

- Elevate your level of service.
- Do what you say you'll do and do it well!
- Have standards set for how you and your team will perform the customer experience. And inspect what you expect!
- Utilize technology wisely for the benefit of the customer.
- Get every customer on your KW Mobile App!
- Leverage your team and your vendors so they also provide an excellent customer experience.

From Aha's to Achievement

<p>AHA's</p> <p><i>What are your Aha's?</i></p>
<p>BEHAVIORS</p> <p><i>What behaviors do you intend to change?</i></p>
<p>TOOLS</p> <p><i>What tools will you use?</i></p>
<p>ACCOUNTABILITY</p> <p><i>What does accountability for this look like?</i></p>
<p>ACHIEVEMENT</p> <p><i>What will you achieve?</i></p>



My CX System: ²Serve



How will I ensure that I do what I say and do it well? (Complete the table below with standards you will implement to ensure you serve your customers at the highest level.)

General Standards			
1	Instructor:	6	
2	<i>Have participants take 5 minutes to complete step 2 of their "My CX</i>	7	
3	<i>System".</i>	8	
4	<i>Ask for a few to report out.</i>	9	
5		10	
Communication Standards			
1		5	
2		6	
3		7	
4		8	
Mindset and Image Standards			
1		3	
2		4	
Technology Standards			
1		4	
2		5	
3		6	
Standards for Vendors			
1		3	
2		4	
Standards for Teams			
1		3	
2		4	

My Customer Experience System



CHAPTER 4: SURVEY

SLIDE #59

Instructor:

Timing for this chapter: 60 minutes 1:00 –2:00

50 minutes +5 minutes for 2 videos 5 minutes for “My CX System”... 18 pages

Purpose of this chapter: “Survey” is the third step in the CX Five–S Model. To survey is to check in and understand how the customer feels about their experience. The only way to ensure the greatest customer experience is to check in regularly and ask for feedback and surveys and track your CX “score.”

This is another area where having systems in place to ensure that feedback is happening is critical. As a result, make necessary adjustments.

Five–S Model: 1) Set, 2) Serve, 3) Survey, 4) Surpass, and 5) Sustain.

- Survey the Customer
 1. Check in Frequently
 2. Ask for Feedback
 3. Track Your CX Score
 4. Make Improvements

Survey the Customer

3 Survey

“Survey” is the third step in delivering an exceptional customer experience. You have to check in with your customers. To ensure the best possible experience every time, you know now that you need both standards (that can be measured) and systems (processes.) Request feedback and be prepared for the good and the bad.

The customer experience is about the relationship and how your customers **feel** *before, during,* and *after* the real estate transaction. It’s a journey *and* a destination.

It’s one thing to survey for survey’s sake. It’s another to check in frequently, track results, acknowledge and reward success, and make any necessary improvements.

You need to implement standards and systems for you, your team, vendors, and allied resources so that you all:

1. Check in frequently
2. Ask for feedback with surveys, reviews, and testimonials
3. Track your “CX score”
4. Make improvements

1. Check in Frequently

SLIDE #61

TRUTH

The customer's point of view is the only one that counts!

Instructor
Point out the third bullet. Do not assume your customers will do this.

How will you know how you're doing? And more importantly, how your customer thinks you're doing? By checking in often. It's an emotional time for the customer—are they happy, impressed, content, and well-served? Check in and ask! Their opinion counts!

- Let your customer know at the beginning of the transaction how and when you will check in with them during and after the transaction.
- Communicate to them that it is your job to ensure that the results are positive. Never hang up the phone without telling them what is happening next. Always ask them if they have any questions.
- Ask the customer to stop you at any time during the transaction if they have an issue. (It will be more difficult to fix the issue later.)
- Throughout the transaction when you check in with your customer, make it memorable and personable.
- _____
- _____
- _____

Ask participants to list three standards they will implement to check in with their customers.

Ask the question at the bottom of this page.

Think back to the \$24,000 lesson. How would it have been different if someone had been checking in with those sellers?

If you want to achieve at a high level, you have to check in!

Beware – Barometers Go Up and Down



The customer experience is not just contingent upon a final outcome; it is measured at every point of contact along the way. The customer experience is always in flux. Like a barometer, it goes up with every success and it drops with every failure. The customer experience is a journey.

Never Assume

It is dangerous to assume that just because your service met your standards, that it met your customer's expectations. Most dissatisfied customers will not complain directly to you because complaining takes a lot of effort. They would rather take their business elsewhere if they didn't like something about your service.

Ask how the customer *feels* about your service, and remember, how they feel about your service may not be consistent with how well you are delivering it. Survey the customer, check in and make sure you are delivering what they are expecting. Are they receiving the experience they are expecting?

You can't fix what you do not know is broken. Through listening to your customer, you will know what questions to ask. Be proactive when you can. Their customer experience is counting on it!



Steve Chader has an example of how great agents can do a great job, but if the customer doesn't "feel" it, it's not happening.

A customer did not want to work with an agent on his team anymore. The agent working with the customer had been working really hard, going above and beyond to deliver great service. The agent did everything right, or so they thought.

When Steve asked the customer why they were unhappy with the agent, their response was because the agent did not call them back right away. So, although Steve's agent was performing at a very high level, the client "felt" that their experience was not good.

Instructor:
Have participants read the story and answer questions.

Activity: Reflection

After reading Steve's story, complete the following reflection questions listed below.

<p>What could the agent have done differently?</p>	<p><i>Asked the customer how often and when they wanted be communicated with. What systems could they put in place to resolve this and keep it from happening again?</i></p>
<p>Have you experienced a similar situation? What did you do to rectify it? How did it change your behavior?</p>	
<p>How important is the customer feedback to you? What standards or systems do you have in place today on how often you survey/check in?</p>	
<p>How does the relationship affect the customer experience?</p>	

Instructor:
Ask for aha's.

Tell: *How someone "feels" is critical!*

How someone "feels" is critical!

SLIDE #62

2. Ask for Feedback

Instructor:

Ask: When was the last time you selected a restaurant or place to stay based on the reviews you read online?

Pretty important right?

Video is located on KWConnect.

**VIDEO
SLIDE #63**

Instructor:

Tell: This video leads us into how important it is to ask for feedback, reviews and testimonials are important to our business.

Use Surveys, Reviews, and Testimonials

Feedback increases our understanding of what the customer is expecting us to do to exceed their expectations. Have a system in place to ensure that you are surveying and asking for feedback. Ask for reviews along with testimonials at regular intervals—not just once!

The Role Reviews and Testimonials Play in Consumers' Purchase Decisions

- 86 percent of consumers read online reviews for local businesses. – BrightLocal Local Consumer Review Survey
- 68 percent of consumers were more likely to buy from a local business with positive online reviews. – BrightLocal Local Consumer Review Survey
- For 89 percent of customers, testimonials are considered the most effective content marketing tactic. – Spiceworks B2B Content Marketing Trends
- 90 percent of consumers say buying decisions are greatly influenced by positive reviews. – Zendesk survey (data from Dimensional Research)



**VIDEO
(1:40 MIN)**

MYTH: Of Course They Will Write Me a Review
BUSTED: Only if the Experience was Awesome or Awful

Watch this “Hear It Direct” video. What compels you to write a review?

Conduct Surveys

SLIDE #64
1 of 2

A survey system would consist of:

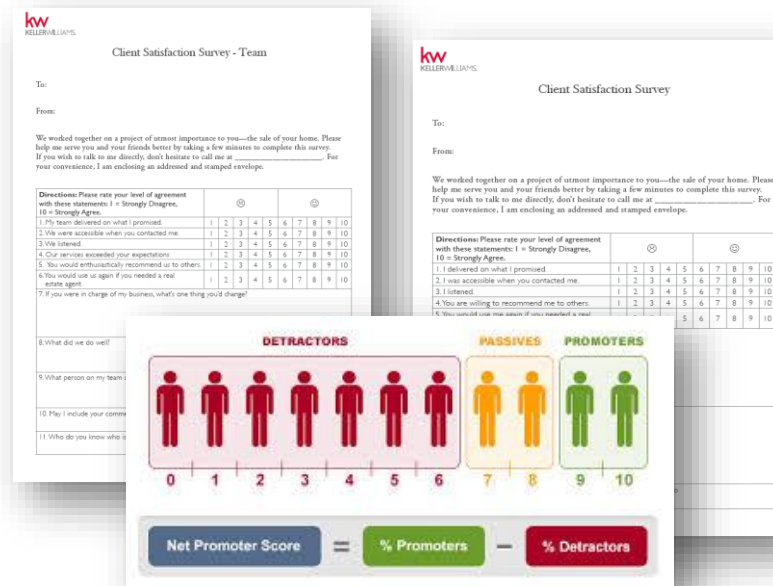
- Survey instrument (list of questions)
- Delivery method (electronic, paper, interview, automated survey, etc.)
- Scheduled dates to send to customer
- Method of recording and tracking results

When is the best time to survey your customer on their experience?

1. During escrow, from contract to close—all touchpoints during the transaction
2. After the close
3. One to two months after the close
4. One year later
5. All of the above

Utilize the Customer Satisfaction surveys available to you online. Refer to the appendix for how to access these and other resources.

Customer Satisfaction Survey Example



Instructor:

Tell: *If you tell you clients up front there is a survey for them to fill out, they are more likely to do it.*

Instructor:

Discuss the pros and cons of surveying at these different times. What are the benefits of each?

There are a variety of tools you can use to survey your customers and measure the experience you and your team provided.

Find one that works for you and your team! Keep it simple.

Download Survey Example's, and the Net Promoter Job Aid

Net Promoter is just an example.

From the course Toolkit on KWConnect.com.

SLIDE #64
2 of 2

Ask for Testimonials and Reviews

1. Instructor:

Discuss: *The*

value of reviews and

testimonials.

If time allows, have

participants

make a phone call in class to 1

or 2 of their

most recent

customers and

ask for a

testimonial or

review.

When is the best time to ask for reviews or testimonials? Anytime anything good happens! This is a great time to ask for feedback and specifically a review online!

Ask right after the transaction closes. This is when the customer is happy to be either a) moving into their new home, or b) selling their home and able to move on.



Activity: Ask for Testimonials and Reviews

Call your **five most recent customers** and ask for a testimonial or online review. Make it easy for them: give them options—and thank them! This is also a great time to ask for a referral!

Note: *A few bad*

reviews are

okay; you need some bad

reviews to be

valid, perfect

scores are not

realistic. If and

when a bad

review happens,

apologize and

respond

immediately.

- Yelp
- Zillow
- Trulia
- LinkedIn
- Facebook
- Email
- Text
- Voicemail, etc.

2. Instructor:

Customer reviews, testimonials and surveys benefit you in a two ways.

1. They market you, your branding and your business to customers.

2. They provide a CX score.

Utilize results to measure the CX experience and value that you, your team, and vendors are delivering to your customer.

3. Track Your CX Score

SLIDE #65

Consider developing a CX score as many top agents have done to measure consistency and progress.



Peter Chabris and his team are implementing a system to measure their customer experience results.

“We start our meetings now with wins and where we went the extra step for our clients.

“Our CEO—Customer Experience Officer—is responsible for making sure CX surveys are completed by our customers. For example, we ask:

- Do you feel your agent cared about you?
- Did your agent set expectations?
- Did they exceed expectations?
- Did your agent make you feel like you were the only client?

“The results we get have been a game-changer for us!”

Instructor: Tell: *CX is not an option it is critical, it leads to all of these things.*

Instructor:
Discuss the possibility of having a CX score and what that would look like.

Ask: *Think about when you have gone online to find a good restaurant, did you look at the reviews? How did they influence your decision?*

Feedback is the breakfast of champions. Embrace it and learn from it!

How will you measure your customer's experience?

Instructor:
Ask your database to write your reviews. Consider rewards for reviews, surveys, testimonials, etc. Keep track of survey results and measure them on a regular basis.

The younger generations will check you out online.

SLIDE #66

4. Make Improvements

Learn from both your successes and mistakes, and make improvements to your systems—just like the team with the \$24,000 lesson had to do. And don't forget to always **inspect what you expect!**

Instructor:

When Things Go Right

Discuss: *Don't*

be attached to the outcome.

When the customer has a great experience and is happy with the job you did and the relationship you all have built, you have a raving fan! They represent an opportunity for repeat business and an opportunity for referral business now and in the future.

There is a difference

The experience you provided is being talked about at the soccer game, at the workplace, and through testimonials online. Your customers refer their family, friends, and neighbors to you, because you provided true value and made them feel at ease during their real estate journey.

between being committed and

being attached.

When Things Go Wrong

You should not

be attached.

Do not be upset when things go wrong. Take ownership. Look at challenges as opportunities to demonstrate your problem-solving skills. Problems can be magic moments if you speedily address setbacks or issues. When you come through, your customers will notice your performance and sing your praises, to you and to others. In anything involving people, problems and mistakes are inevitable.

SLIDE #64

Tell: *When things go*

wrong, you can

use this as an

opportunity to

create Raving

Fans!

Don't let mistakes ruin the entire customer experience. Gary Keller says tell them up front during your initial consultation to not judge you by your mistakes but how quickly you recover from them.

TRUTH

Remember the old adage, "People don't hire you for when things go right. They hire you for when things go wrong!"

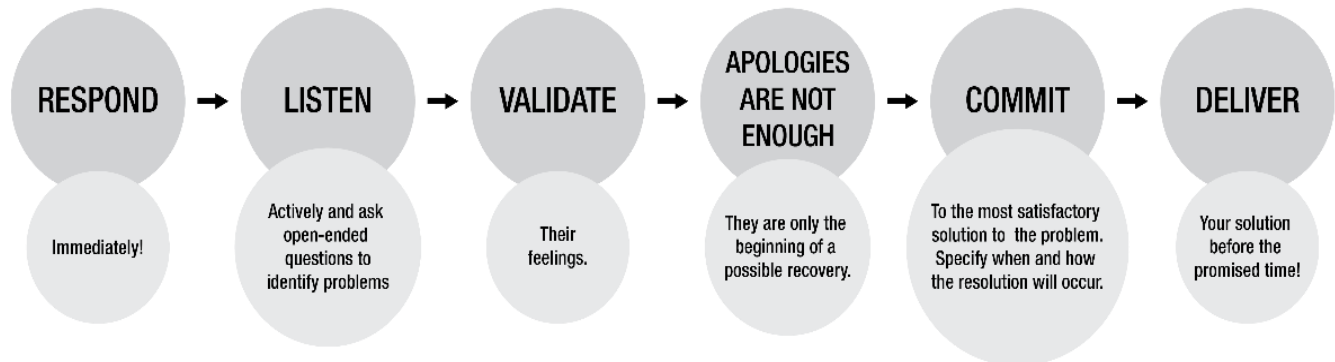
Instructor:
Tell: *Every time something happens is an opportunity to be a hero.*

Address Issues Head-on!

Should problems, misunderstandings, or mistakes arise, identify and fix them quickly. View problems as opportunities to create a "wow" factor in their customer experience.

Respond immediately, **listen**, **validate**, and **apologize**. Address the issue immediately, **commit** and **deliver**. How you handle problems can and will affect your credibility. Mistakes can cost you customers and revenue.

SLIDE #67



Rae Wayne, Mega Agent from Marina Del Ray, California, says, "When things go wrong, approach the situation with patience, empathy, and assurance that you have done this before. Your skill of having patience, empathy, and listening is so important when relating to people.

"We feel the best course is to be cooperative. 'We're in this together. We will solve this together.' Let's not focus on the blame but rather on the solution."

Instructor:
Ask for a volunteer to read. What are some aha's?

TRUTH


Turning complaints into a positive experience is a definite way to cultivate loyal customers who become your referral campaign.

This course provides a list of tips to remember when resolving conflicts. It can be found in the course toolkit online at KWConnect.com.

Instructor:
Mention there are tools they can use in the course toolkit online.

Customer Experience – Building Systems – Relationships – Loyalty

CUSTOMER EXPERIENCE



BUILDING SYSTEMS
RELATIONSHIPS
AND LOYALTY

Tips for Resolving Conflict

1. Always view conflicts as problems to be solved rather a battle to be won or lost!
2. Always focus on facts and not your emotions.
3. Be disciplined in retraining yourself to focus on the issue instead of personalizing their comments.
4. Apologize and validate the issue.
5. "Own" your statements by using "I" language.
6. Probe and identify the problem.
7. Ask for details and clarify that you understand.
8. Repeat back what you heard to your customer in abbreviated terms.
9. Ensure you and the other person fully understand the exact nature of the problem, as well as each other's goals, before you come up with any possible solutions.
10. Rationally talk about the pros and cons of possible solutions together.
11. Use language that enhances the feeling of working together.
12. The more solutions you identify and consider, the greater the likelihood that the conflict will be managed successfully.
13. Sometimes people focus on symptoms, not the real problem. It's critical to identify the core issue in order to come up with a workable solution.
14. Come to agreement on what will work for both of you.
15. Fix the problem as soon as possible.
16. Assure your customer that the problem will not happen again.

Customers—always come first!

Download "Tips for Resolving Conflict"



From the course Toolkit
on KWConnect.com

Instructor:

Tell: *This video reminds us of what our customers' are expecting from us. It's really pretty simple.*

VIDEO SLIDE #68



VIDEO (1:54 MIN)

MYTH: My Sellers Know They Are My Highest Priority
 BUSTED: Their Perception is Their Reality

Watch this "Hear It Direct" video. How do you show them and what do you do to show your customer that they are your highest priority?

Activity: 1. Reflection Discussion

SLIDE #69

Complete the questions listed below. (5 minutes)

Instructor:

<p>Check in: How do you currently get feedback from your customers?</p>		<p><i>If time permits, have participants brainstorm solutions in groups to situations where a customer is unhappy for some reason. (5 minutes)</i></p>
<p>Resolve Issues: Think of a time when you checked in with your customers and something was not right.</p> <ul style="list-style-type: none"> • What did you do to correct it? • What would have happened had you overlooked it? • What would their experience have been like? 		
<p>Current Standards and Systems: What CX standards and systems do you have in place?</p>		
<p>Measure: How do you measure feedback?</p>		
		<p><i>Discuss: what was their resolution? (5 minutes)</i></p>

Models That Work

Instructor: *Remind participants of Monica Reynolds' Group Coaching programs through KW MAPS Coaching where they can get all of Monica's models and systems for the customer experience.*

Monica Reynolds has successfully put the following standards and systems together for her real estate team that greatly enhance the customer experience. They will also help you put together your own standards and systems for surveying your customers.

The Honeymoon Stage

Earlier we learned about a \$24,000 mistake that could have been easily rectified with a system in place. Monica Reynolds' model of one phone call every day for the first five days would have caught that mistake. Be aware that anger could be your most powerful mental state and is contagious. So, when you're confronted with a problem, are you confrontational, non-confrontational, or cooperative?

Now that we've talked about ways to set, serve, and survey expectations, let's talk about the fourth component and discuss ways we can surpass customer expectations.

CX System after the Listing or Buyers agreement is signed*
 Monica Reynolds has created and implemented a standard, which within one hour of the signed contract, the buyer or seller will receive a phone call from their office. She has developed and implemented systems that the assistant will following to make sure their customers are receiving an exceptional personalized experience that meets and exceeds their expectations.
 *The assistant needs to know all they can about the personable and sincere. We care about our customer is unique. Listed below is an example of

Standard Example:
 The Buyer and Seller will receive a phone call from the contract.

System(s) Example:
 1. Pass The Baton
 2. Assistant's first call checklist
 3. Honeymoon Checklist

*From Monica Reynolds, to learn more about KW MAPS recommend you take her classes that she holds s

PASS THE BATON
 Creating the Perfect Customer Experience- Pass the Baton Correctly to Your Assistant

1. Introduction _____ Date _____
 2. Date to Sign the Market _____
 3. Loan Interest _____
 4. KWA/ Name and Company _____
 5. Cell Phone _____ KWA Number _____

	YES	NO
<input type="checkbox"/> 6. Buyer _____		
<input type="checkbox"/> 7. Sign _____		
<input type="checkbox"/> 8. Professional Photo _____		
<input type="checkbox"/> 9. MLS Date _____		
<input type="checkbox"/> 10. Joint Listing _____		
<input type="checkbox"/> 11. Plan _____		
<input type="checkbox"/> 12. 1-800-Home-Net-India _____		
<input type="checkbox"/> 13. Mobile App Download _____		
<input type="checkbox"/> 14. Sample Open/For Sale _____		
<input type="checkbox"/> 15. Seller Relocation _____ When? _____		
<input type="checkbox"/> 16. Referral Agent _____ Agent _____		
<input type="checkbox"/> 17. Lockbox _____		
<input type="checkbox"/> 18. PMS _____ Name/ Title _____		
<input type="checkbox"/> 19. PMS _____ Name/ Age _____		
<input type="checkbox"/> 20. Showing Instructions _____		
<input type="checkbox"/> 21. Special Instructions _____		
<input type="checkbox"/> 22. Property Features/Notes _____		

Assistant's First Call Checklist

Seller: _____ Date: _____
 Address: _____ Phone: _____
 Source of Business: _____ Email: (H) _____
 Email: (W) _____
 Personality Wife: D I S C Personality Husband: D I S C

Good morning, this is _____ with _____'s office. (Agent's name) asked that I call you as part of our customer service and introduce myself. It is a good time to talk! I am the listing manager, and I will be handling all the paperwork. Did you receive my card? Great, I work Monday through Friday, and I will always be available for your questions.
 Check this off as you mention them on the first call.

<input type="checkbox"/> 1. Business Card	<input type="checkbox"/> 7. Business Hours
<input type="checkbox"/> 2. Tuesday and Friday Call Communication	<input type="checkbox"/> 8. Arch Takecom
<input type="checkbox"/> 3. Showings (how it's handled/feedback)	<input type="checkbox"/> 9. Missing Paperwork
<input type="checkbox"/> 4. Website	<input type="checkbox"/> 10. Referral
<input type="checkbox"/> 5. Sign Info	<input type="checkbox"/> 11. Email (personal/work/home/insta)
<input type="checkbox"/> 6. MLS Pinpoint	<input type="checkbox"/> 12. Discuse Close

I will call you weekly on Thursdays between 1 and 2 to give you a market update. What phone number would you like me to call? Great. Also, as part of my job, our business is based on referrals. Do you know anyone that could use our services?
 Thank you for working with our TEAM! We appreciate your business. Is there anything else I can do for you at this time to help you?
 Have a great day!

Three Week Honeymoon of Communication

Week 1

- Assistant introduction call within 24 hours using First Call checklist.
- Thank you for listing letter with all signatures of team.
- Buyer agent(s) or office to preview within 48 hours.
- Agent to call and say thank you/ask for referrals within first 5 days.
- Letter with copy of MLS pinpoint sent by mail to seller.
- Assistant to call Seller and provide code for their property for Arch Takecom to hear the recorded message.

5 pinpoint and disclosures. Check for mistakes.
 site, MLS website, KW website, Zillow, Realtor.com.
 groups (including feedback) or lack of showings.
 link to top 50 agents (and copy Seller).
 is an asset.
 ility stats sent for area and county.
 has with checkmarks that all items are completed.
 whom call log for seller's review:
 number of hits on internet sites and on their property for seller's
 Price Reduction and review showing results or lack of
 PROPERTY
 Perfect Real Estate Assistant—v4.0
 Keller Williams Realty, Inc.

Chapter Take-Aways

SLIDE #70

- Survey regularly by checking in to see how things are going.
- How the customers feel about your service may not be consistent with how well you think you delivered it.
- CX does not happen overnight, you have to continuously work on it.
- Customers evaluate you ... every day, and their opinions (their barometer) goes up and down.
- Adopt feedback systems and make improvements when things go wrong.
- Take ownership and address issues head-on.

From Aha's to Achievement

Instructor:
Ask participants for aha's.

<p>AHA's</p> <p><i>What are your Aha's?</i></p>
<p>BEHAVIORS</p> <p><i>What behaviors do you intend to change?</i></p>
<p>TOOLS</p> <p><i>What tools will you use?</i></p>
<p>ACCOUNTABILITY</p> <p><i>What does accountability for this look like?</i></p>
<p>ACHIEVEMENT</p> <p><i>What will you achieve?</i></p>

Ask them to complete answers to these questions.

Instructor:
Have participants take 5 minutes to complete the next page of their CX system (on the next page). Ask for a few to report out.



3 Survey



SLIDE #71

My CX System:

How and when will I check in with my customer?

3 Survey

- Call and ask _____ (when/how often).
- Ask them to complete a survey _____ (when).

What questions would you like answers to?

1. _____
2. _____
3. _____
4. _____

- Ask for a testimonial _____ (when).

What will you do with the testimonial?

- Put on website _____ (when).
- Put on social media _____ (when).
- Put on marketing collateral _____ (when).

- Ask them to post on social media/Yelp _____ (when).

- Ask for referrals _____ (when/how often).

- How will I track referrals? _____
- How will I reward for referrals? _____

What resources am I currently lacking to put these survey steps in place?

Who will I get help from to get these completed? _____



3 Survey

CHAPTER 5: SURPASS

SLIDE #72

Instructor:

Timing for this chapter: 50 minutes 2:00–2:50

45 minutes no videos +5 minutes for “My CX System” 18 pages

<<Break – 10 minutes 2:50 – 3:00>>

Purpose of this chapter: “Surpass” is the fourth step in the Five–S Model.

Surpassing expectations is the difference maker in customer experience. The rest of the Five–S Model is great and yet won’t succeed without Surpass.

The rapport and relationship with your customer is very important. Sometimes meeting expectations is not enough to wow your customers. It’s about going above and beyond and doing unexpected things, or doing expected things in unexpected ways. Surpass and exceed customer expectations through 1) Deliver what was agreed upon 2) Share knowledge 3) Prepare customers for what comes next 4) Provide unexpected service moments. Participants will create their system for how they will surpass expectations.

Five S Model: 1) Set, 2) Serve, 3) Survey, 4) Surpass, and 5) Sustain.
In this chapter ...

- Surpass Expectations
- Elevate Your Service
- Reap Big Benefits!

Surpass Expectations **4 Surpass**

“Surpass” is the fourth step in delivering an exceptional customer experience. Customers expect a certain level of service during the real estate transaction. Just meeting those expectations may not be enough to wow your customers.

Instructor:

*Tell:
Set*

Keep Customers Informed

*expectations,
for example:*

Prepare Them For What Comes Next

“When we get an offer, here is what you look for.”

Never hang up the phone without telling your customer what is going to happen next. Communicate what you are doing on their behalf so they understand the **value** that you are creating for them.

Always put yourself in your

customer’s shoes.

Remember they are still dealing

with everyday life situations.

Always set it up to exceed

expectations to create an

excellent customer

experience.

Scenario:	
Your customer has never sold a house before and you’ve just called to tell them a buyer has made an offer.	
<p>What standards can you implement to make sure your customer knows exactly what is happening and what will happen next?</p>	<p>Instructor: <i>Facilitate a discussion on this scenario.</i></p> <p>Examples:</p> <ul style="list-style-type: none"> • <i>Compute the net ahead of time.</i> • <i>Tell them the timeframe.</i> • <i>Set the stage for a low offer.</i> • <i>There may be more offers.</i> • <i>Contingency period.</i> • <i>Repairs process.</i>

Delight the Customer

Surpassing Expectations Does Not Happen By Accident!

When the best agents do what they always do in a special way, they incorporate it into their everyday service delivery. Therefore, while it is a surprise to the customer, the agent planned it all along.

When the best agents do something special and unanticipated, they are looking for this opportunity from the beginning of the relationship. They are listening and paying attention to what their customer values and needs the most (the transaction, their hobbies, or their interests).

This is where you have the opportunity to build relationships and offer real value while delivering an exceptional customer experience.

Instructor:
Remind participants this is why models and systems are so important! It should not happen by accident.

Do Unexpected Things in Unexpected Ways

Surpassing expectations only occurs when you consistently do what you said you'd do, and then provide unexpected service moments. Combining these actions is a forgotten business opportunity that you can take to set your service apart from others. People enjoy getting more than they thought they were getting; it will make them feel special. You'll come across as the type of person who thinks of customers' individual needs.

Instructor:
Tell: Look for opportunities to "delight" the customer and make sure you let them know you did it.

Recall a time you did an unexpected thing in an unexpected way, and the effect of that action.

Scenario	What was the effect?
	<p>Instructor: <i>Facilitate a discussion on this scenario. Ask them to remember a time they did an unexpected thing and the effect of that action.</i></p>

Instructor:

Do One Unexpected Thing

Ask: *What unexpected things can you do? Look for opportunities to wow your customer, just small things will work.*

You can surpass expectations by doing one unique and special thing. Instead of “plussing” aspects of your services, do something extra in addition to your services. Provide an item or service of value to customers that would mean the most to them.

You can do this during the transaction or at the end. Research is very clear that every transaction should end strongly. With this in mind, you would almost always want your unexpected item or service to occur at the end of the transaction. So, do your one unexpected thing at the end of the transaction to have the most memorable effect.

+1 Factor

When surpassing expectations, you don’t have to do ten phenomenal things. Always use the “+1 factor.” One delightful or surprising thing should almost always be memorable enough.

You can do more than one unexpected thing, but if you do too many, customers may come to expect them, and may not feel special or unique. When you deliver too many special services, the law of diminishing returns comes into play. It can end up costing you time and money that is not fully appreciated. Trying to do too many unexpected things can become unmanageable and unaffordable.



Dianna Kokoszka tells a story of when she was the listing agent and they had just closed on the house. She said, “I called to just check in with the buyers, asking if the key worked, did everything go okay.” By the tone of the buyer’s voice, Dianna could tell something went wrong. She said, “The way you are speaking, I can tell everything did not go okay. May I ask what went wrong?” The buyers told her:

- The house was not clean.
- The beautiful, custom towel racks they loved were gone; the sellers had taken them.
- Even the commode had been taken.

Dianna called the sellers to let them know they could not take the commode. She went into further action, sending a cleaning crew over to the house to clean it. She went out and purchased new towel racks and personally took them to the buyers, along with a \$100 gift card for their inconvenience.

The buyers called their agent and they were told it was not his problem. Dianna went above and beyond and did the unexpected thing. That says a lot. She did the right thing she cared about the customer even when it was not her customer.

Instructor:
Have participants read the story and give aha’s.

Tell: *You own the outcome, you own the experience. The littlest things have the biggest impact.*

Sellers – How Can You Turn the Expected into the UNExpected?

Instructor:

Tell:

Easy way to surpass? Do the unexpected! Delight your customers!

Sellers want you to help them achieve the highest sales price, in the shortest time, with the least hassle.

How can you address their needs and turn the expected into the unexpected? The easiest way is to set expectations knowing that you can exceed them.

Examples for Sellers

The following pages are ideas on how to turn the expected into the unexpected for buyers and sellers.

- Instead of just letting them self-discover new competitive homes that come on the market, you set them up to receive MLS updates of new listings in their area.
- Instead of just having an open house, ask the seller for their December holiday season mailing list and invite them as well.
- Set an expectation that you will call once a week to give an update, and then call twice a week.
- Take a picture of them in front of the for sale sign; send out postcards on their behalf to friends and relatives.
- Assist with packing and/or provide short-term storage.
- Create an album of family photographs of their prior home.

Note: If you are running short on time, you can summarize pp. 109–111. This is a great reference for our agents.

Can you think of more? Can you think of any examples that might occur spontaneously?

- _____
- _____
- _____
- _____

Instructor:

Ask: *What other examples do you have?*

Remember, you can surpass expectations by doing one unique and special thing.

Buyers – How Can You Turn the Expected into the Unexpected?

Buyers want you to find the right property, at the best price, in the right amount time, with the least hassle.



Steve Chader shares a story.

“We had an attorney from out of town who was looking for a property. We interviewed him, did the analysis, narrowed it down to six houses, and our agent went to each property and previewed all six prior to him coming to town. He was so impressed! He shared that he had bought houses all over the United States and spent millions of dollars on properties in the past, but he had never experienced an agent doing this for him before. He had a wow experience.

“Because of his experience, he is a raving fan now, and we have referrals and repeat business from him. He was not expecting the unexpected we delivered.”

Instructor:

Ask a volunteer to read Steve's story.

Ask:

Are agents always prompt?

Have a standard that you are always early. You will go above and beyond.

Ask for Aha's.

Examples for Buyers

Instructor:

Ask: *What other examples do you have?*

How can you address their needs and turn the expected into the unexpected?

Here are some examples:

- Instead of just telling them they need financing, you can recommend a lender, set the appointment, attend the meeting, and assist them with their decision-making. (see Appendix for a job aid, “7 Critical Points in the Mortgage Process for Realtors”)
- Preview the home beforehand.
- Take pictures of each home and review them all at the end.
- Instead of just touring homes, you plan the order of the route, plot the routes and homes on a map, print the MLS sheets on different colored paper for each home, and include interesting information about each house that the listing agent has shared with you. In addition to this, provide snacks, drinks, and items to keep their children busy (coloring books, games).
- Instead of just presenting the buyer’s offer, you can take a picture of them and help them write a personal letter to the seller.
- Host a housewarming party for your buyer; invite all their closest friends.
- Plant and dedicate a tree in the new yard.
- Offer to pay for a babysitter for a specific time period.

Can you think of more? Can you think of any examples that might occur spontaneously?

- _____
- _____
- _____
- _____

For Both Buyers and Sellers

Examples turning the expected into the unexpected to make the customer feel special and letting them know that you care!

- “Just moved” postcards with old and new addresses
- A jigsaw puzzle made from a photo of the house
- A professional photograph or etching of the home
- Host yearly events
 - Sporting events
 - Movies
- Host charity events
- Host holiday events
 - Include pictures for the kids with the Easter Bunny
 - Pies at Thanksgiving
 - Personalized Christmas ornaments
- Sponsor community events
 - Little League, soccer, volleyball, etc.
 - Theater
 - Boy and Girl Scouts
- Deliver food to customers’ homes on certain times of year with a personal note

Instructor:
Ask: *What other examples do you have?*

Can you think of more? Can you think of any examples that might occur spontaneously?

- _____

SLIDE #74

Activity: Yes, And!

Instructor:

Brainstorm ideas to broaden your palette of strategies for surpassing customer experience.

If time permits, Time:

*this is a FUN,
QUICK activity to
get the
participants
thinking BIG
about
surpassing
expectations!*

- Setup: 2 minutes, form groups, understand instructions
- Brainstorm rapidly: 2 minutes
- Report out: 1 minute per team

Process:

- Form groups of 6–8 people.
- Each group forms a circle and chooses one member to “start.”
- The person who starts will offer ONE idea for surpassing.
- Going around the circle, the next person can only say, “YES, AND ...” and plus (that is, add to) the suggestion of the first person. Be creative and have fun with this! Go crazy with your ideas.

Example:

1. Hold a party for the customer
 2. Yes, and have balloons for everyone
 3. Yes, and have drinks provided
 4. Yes, and ... (keep going)
- Keep going around the circle for the full 2 minutes, quickly!
 - When time is called, each starter will report out on their team’s final suggestion for surpassing the customer experience.

Elevate Your Service

SLIDE #75

At Keller Williams Realty, we want our agents to have an elevated level of service that creates an unforgettable customer experience, an experience that has a tangible difference from all other companies.

Our customers are our raving fans! We surpass all others—when buyers and sellers think of real estate, they know to go to a Keller Williams agent for the Keller Williams experience!

Most of us think that surpassing expectations is difficult and likely expensive. All it takes on your part is to truly care about your customer and pay attention to what is important to them. It doesn't have to cost much. There are many ways you can personalize gifts and provide special services inexpensively.

In the Age of the Customer, you are expected to exceed customer expectations.

What companies come to mind when we think of great customer experience?

- The Ritz-Carlton
- Starbucks
- Nordstrom
- Southwest Airlines
- *Fed Ex – Reliable and Consistent*
- *Costco*
- _____
- _____

Instructor:

Ask: What do all these companies have in common? What is that experience like?

Ask: How are they known for great customer experience?

Ask: What if you were renowned for great customer experience?

Tell: This is what it is all about, elevating your service.

SLIDE #76

Reap Big Benefits!

Instructor:

It is when you surpass and exceed their expectations that you AND your customer reap the BIG benefits!

Ask for a few examples from participants.

In your Pre-Work, you remembered an experience that you raved about to your family and friends.

Tell: *This is what we want our customers to experience. We want our customers to have these experiences. We want them to share the experience they had with us, with others. Remember, benefits have a ripple effect.*

What was it that surpassed your expectations?

Example: Does Amazon's delivery service surpass your expectations?

How did that enhance your experience?

Who did you share your experience with?

When you surpass expectations, you provide value to your customer and this increases your customer's overall positive experience.

Delighting and wowing them makes them "feel" good and they will remember you for it and recommend you to others. You create relationships and raving fans that are loyal for life!

What are some ways you've wowed and surpassed your customers' expectations?

How have your customers benefited?

You Benefit

Surpassing expectations benefits you by increasing your credibility. It shows your customers that you're the type of person who thinks of their individual needs and creates loyal customers who generate positive word-of-mouth advertising.

People enjoy getting more than they thought they were getting; it'll make them feel special. You will come across as the type of person who thinks of customers' individual needs. You benefit:

- Personally
- Professionally
- Financially

Raving fans will tell others about their experience with you, and your repeat and referral business will grow.

How do you benefit?

Instructor:
Share how you've benefited by providing great customer experiences.

Personally?	
Professionally?	
Financially?	
What are some ways you can improve your benefits?	
How will you let other potential customers know what your raving fans are saying about you?	

Chapter Take-Aways

- To surpass expectations, set, meet, and deliver on expectations first.
- Surpassing expectations does not happen by accident.
- Prepare customers for what comes next.
- Do unexpected things in unexpected ways.
- Truly care about your customer, pay attention to their needs, and reap the benefits.

SLIDE #77

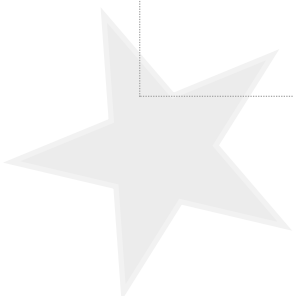
Instructor:
Ask, participants for aha's.

From Aha's to Achievement

<p>AHA's</p> <p><i>What are your Aha's?</i></p>
<p>BEHAVIORS</p> <p><i>What behaviors do you intend to change?</i></p>
<p>TOOLS</p> <p><i>What tools will you use?</i></p>
<p>ACCOUNTABILITY</p> <p><i>What does accountability for this look like?</i></p>
<p>ACHIEVEMENT</p> <p><i>What will you achieve?</i></p>

Instructor:
Allow participants 5 minutes to complete the following page—step 4 of their CX System.

Ask for a few to report out.



My CX System ¹ Surpass



How will I ...

- Continue to enhance my customer’s experience and bring unexpected value to them?

- Always prepare customers for what comes next?

- Do unexpected things in unexpected ways?

- +1 Factor – do one unique and special thing?

What standards and systems will I implement for myself, my team, and my vendors to ensure surpassing customer expectations?

My Customer Experience System

*You do not have to do ten phenomenal things.
One delightful or surprising thing should almost always be memorable.*



CHAPTER 6: SUSTAIN

SLIDE #79

Instructor:

Timing for this chapter: 60 minutes 3:00– 4:00

50 minutes +5 minutes for 1 video +5 minutes for “My CX System” 12 pages

Purpose of this chapter:

“Sustain” is the fifth step in the Five–S Model. The customer experience does not end at closing. The business opportunity to sustain your relationship with your clients is priceless.

- *When you resolve an issue or go that extra mile, let your customer know. It is important they know how hard you are working for them.*
- *Show them the value you bring. They are important to you, their experience is important to you. You truly care!*

In this chapter ...

Create your legacy

Five–S Model: 1) Set, 2) Serve, 3) Survey, 4) Surpass, and 5) Sustain.

- Sustain the Relationship
- Profit
- Growth
- Customer Loyalty
- Your Systematic Approach to Success
- Create Your Legacy

SLIDE #80

Sustain the Relationship **Sustain****Instructor:****Tell:**

Continue delivering a "WOW" customer experience even after the close!

Refer back to chapter 1 and the Value of the Customer activity.

Tell: Sustaining the relationship with the customer brings opportunity for referrals and repeat business.

"Sustain" is the fifth step in the CX. The customer experience does not end at closing. Continue to build and sustain the customer relationship.

The business opportunity to maintain your relationship with your clients is priceless. Remember, if you are not staying in front of your clients after the closing, someone else is!

Stay Top of Mind

You have worked hard at establishing trust with your customer. You made them feel special and created a unique customer experience for them; they wrote raving reviews on the service and value you brought them. Hang on to your customers! They are your raving fans! Continue to maintain and nurture your relationship after the close.

Invest in Your Business

The time and effort it takes to continue to nurture your relationship is one of the best investments you can make in your business. Successful Mega Agents' repeat and referral business is as high as 90 percent or more.

Promote Great Customer Experiences

With customer feedback, you can measure, track, and tweak your customer experience service. When you know you've done well, toot your own horn! Use customer reviews and testimonials to market your business.



VIDEO
(2:40 MIN)

MYTH: They'll Remember Me When They Go to Sell
BUSTED: Only if You're Still Top of Mind!

Watch this "Hear It Direct" video. What can you do to stay in touch with your customer?

VIDEO
SLIDE #81

Instructor:
Tell: This video reminds us we must sustain our relationship with our customer and stay top of mind.

Activity – Promote and Brand Yourself

How will you promote and brand yourself so others know that customers do business with you because of your great customer experience?

SLIDE #82

Instructor:

*Ask: How do you stay top of mind long after the close?
What about continuing to ask for referrals?*

Tell: Communicate after the close just as much as during!

SLIDE #83

Instructor:

Tell: It's important to keep your customer long after the close, since statistically most people don't use the same agent again. Successful Mega Agents' repeat and referral business is as high as 90 percent or more.

Profit

When you put your customers first, set and exceed expectations, implement customer experience standards and systems, and stay in touch with your customers, your database will grow. Your profit will grow!

Post-Closing Opportunity

NAR states 90 percent of buyers would use their agent again; only 12 percent do. With sellers 86 percent would use their agents again, 27 percent do.

We are throwing money out the door and missing lost opportunities here.

WHY? The reason is they set and exceed expectations, meet and deliver them. They incorporate standards and systems into their business. They always let their customer know where they are in the real estate process and what will be happening next. They always put their customers first and they deliver an unforgettable customer experience. After the close, they follow up and stay in touch with their customers.



Do you see an opportunity to increase your repeat customers and referrals?

What is your percentage goal over the next year?

Repeats? _____ %
Referrals? _____ %

Keep Your Customer Coming Back for More

How will you keep your customer coming back for more?

5. _____
6. _____
7. _____

Growth

Create a life that explodes with limitless possibilities and unlimited growth. When your repeats and referrals increase, your business grows. Manage your database—this is one of the main tools to help you keep and maintain your customer relationships.

Communicate Regularly

Use the 33 Touch

Keep your database up-to-date with detailed information about your customer's families, nicknames, where they grew up, why they are buying and selling a home, their pet's names, favorite restaurants, health, length of time in home, birthdates, etc. Show you care and pay attention to details. Implement the 33 Touch including the handwritten cards and phone calls!

For more information about 33 Touch and to use programmed action plans, check out marketing tools on KWConnect.com.



David Hoffman comments, "If there is a customer in your database that is not responding to anything, reach out to them; invite them for a cup of coffee. This relationship may need a little more work."

Add Value

Know your customers so you know what means the most to them: a handwritten card or an invite to a baseball game or both. Care about your customer and build relationships and loyalty for life. Sustain your relationship!

What standards and systems will you put in place to stay in touch with your customers after the close and maintain that relationship for a lifetime?

SLIDE #84
1 of 2

Instructor:

Tell:
Mega Agents stay in touch with a true 33 Touch, and in fact, never lose touch. Stress the importance of continuing to add value—always!

Ask the question at the bottom of the page.

SLIDE #84
2 of 2

Reward Customers and Vendors

Instructor:

Tell:

Reward Customers and Vendors even after the transaction, sustain these relationships.

Even after the transaction, reward customers and vendors for referrals through a gift card or personal thank-you. Acknowledge them and let them know how much you appreciate them. Sustain these relationships.



Martin Bouma says, “We have relationships with a lot of good customers and vendors, and when they send me a referral, I send them a gift certificate to a popular deli. On birthdays, they get a handwritten note and a certificate to a famous ice cream place. These personalized touches make them remember and appreciate us.”

How will you reward your customers after the close and maintain that relationship for a lifetime?

How can you help your vendors deliver an exceptional customer experience so it reflects back on you?

How will you reward your vendors who provide that exceptional customer experience on your behalf?

Instructor:

Tell: Be consistent. If you give a gift basket to someone, make sure you give a gift basket to the next person too. People talk.

Ask: Why is rewarding important?

Share how you reward customers and vendors.

Tell: Continue to grow your business, be the agent of choice, and be known for the information, knowledge, and experience you deliver to your customers and vendors. Make them feel unique and special and add value to their lives.

Customer Loyalty

SLIDE #85

To keep your customer a raving fan, they need to continue to feel your presence in the real estate industry. Will they recommend you to others? Will they think of you when they think of real estate? If you did your job, they should and your repeat and referral base will grow.

Instructor:
Ask: *How do you continue to bring value to people?*

Scenario: You have negotiated a great deal for your customer. They are a raving fan. They referred two customers to you.		Instructor: <i>Share an experience and time this happened in your business.</i>
How can you show your appreciation?	Example: <i>Close the loop, call the referrer again and thank them again.</i>	
How can you market this exceptional CX?	Ask, what can I do for you? <i>Remember to share your stories on Social Media.</i>	

Ask: *How do you communicate your successes?*

Tell: *Keep in mind, the information is out there, the value we can provide is our time and knowledge and the experience we deliver!*

Your Systematic Approach to Success

Take a systematic approach to achieving success.

- **Set and exceed expectations** – begin with clearly understanding your customer and setting expectations with them.
- **Serve and deliver the expectations** you've set and agreed to.
- **Survey** and check in often on their customer experience.
- **Surpass expectations** in unexpected ways.
- **Sustain the relationship** to ensure customer loyalty that leads to more repeat and referral business, which translates to more profit and growth in your business.

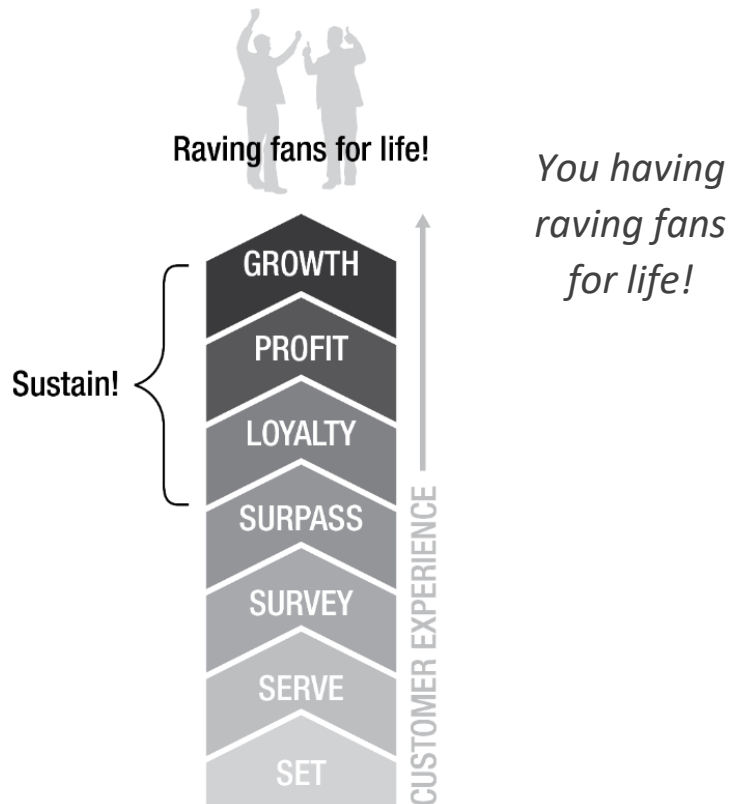
Providing this level of customer experience will result in:

Instructor:

This is a culmination graph of all they've learned today.

When they sustain, they are assured of loyalty, profit and growth.

Raving fans for life!



Create Your Legacy

SLIDE #87

When you resolve an issue or go that extra mile, let your customer know. It is important they know how hard you are working for them. Show them the value you bring. They are important to you; their experience is important to you. You truly care!



David Hoffman states that “Everyone needs to make a difference and leave a legacy. Our legacy is staying involved in our customers’ lives. We hold fundraisers partnering with our vendors. We have political fundraisers that benefit all parties. We host client or charity events 2–3 times a month that are intentional and at a very high level.

Our clients give us so much respect and we only reciprocate. We show we truly care. We stay in touch and follow through and show people how important they are, forever, not just the 30, 60, and 90 days.

The Internet cannot do this. The Internet is a way to give people timely information in a timely way and timely fashion, but there is no better way to strengthen and deepen a relationship than personal human contact and relationships.”

Instructor:
Ask participants to complete their legacy and be ready to share their stories with the group. Share your thoughts too.

What is your legacy?

SLIDE #88

Chapter Take-Aways

Instructor:

*Ask for
chapter
Aha's.*

*Allow
participants 5
minutes to
complete the
following
page of their
CX System.*

*Ask for a few
to report out.*

- Implement your CX Systematic Approach to Success
- Plan and live your legacy now.
- Stay in touch and top of mind with 33 Touch forever.
- Market your great customer experience to others.
- Always offer value in creative and unexpected ways.
- Reward referrals from customers and vendors.
- Reward vendors for representing you well by enhancing the customer's experience.

From Aha's to Achievement

AHA's

What are your Aha's?

BEHAVIORS

What behaviors do you intend to change?

TOOLS

What tools will you use?

ACCOUNTABILITY

What does accountability for this look like?

ACHIEVEMENT

What will you achieve?

My CX System: 5 Sustain



The customer experience does not end at closing, so how can I stay relevant in the customer's mind?

List opportunities for sustaining the relationship with my customer:

1. _____
2. _____
3. _____
4. _____
5. _____

TOP OF MIND

: foremost in one's thoughts; of greatest concern or priority.

How will I remain "top of mind" forever?



PUTTING IT ALL TOGETHER

SLIDE #90

On your way to creating an awesome experience for every customer!

Putting It All Together

Timing for this chapter: 30 minutes 4:00 – 4:30

10 minutes +20 minutes to conclude the course 4 pages

Instructor:

Tell: Everyone understands the customer experience; it takes more to have a deeper conversation and understand the value of a wow CX and implement the Five-S Model to have raving fans for life.

Set and exceed expectations.

Serve – do what you agreed to and do it well.

Survey – always check in, feel the pulse, ask for reviews and testimonials.

Surpass expectations – deliver a wow CX they rave about for years.

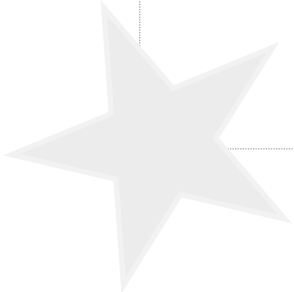
Sustain the relationship long after the transaction – continue implementing the Five S Model throughout your relationship.

In this chapter...

- Final Course Aha's
- Action Steps
- Course Evaluation

Final Course Aha's to Achievement

AHA's
<i>What are your Aha's?</i>
BEHAVIORS
<i>What behaviors do you intend to change?</i>
TOOLS
<i>What tools will you use?</i>
ACCOUNTABILITY
<i>What does accountability for this look like?</i>
ACHIEVEMENT
<i>What will you achieve?</i>



Action Steps

You've heard new ideas today and learned through shared discussions with others in your class. Now it is time to take action, not put away this manual! We recommend:

1. **Complete your Five-S Model;** incorporate into your business.

In the Post-Work section of this manual, there is a Customer Experience Management section that will guide you through this.

2. **Take CX to the next level with a book club** focused on delivering wow experiences and generating customers for life.

Recommended books are included in the Post-Work section

We Want to Hear from You

Please post on our KWU Facebook page anytime your customer experience exceeds expectations. Post a customer review or testimonial.

Go to Facebook and search for "Official KW University".

<https://www.facebook.com/groups/914995165218300/>



Instructor:
Tell: We are all unique, our customers are unique, our experiences and expectations are unique... with that thought, take the time to follow through with these Action Steps and continue to build a CX System that leaves your customers with an experience they rave about to family, friends and neighbors for a lifetime.

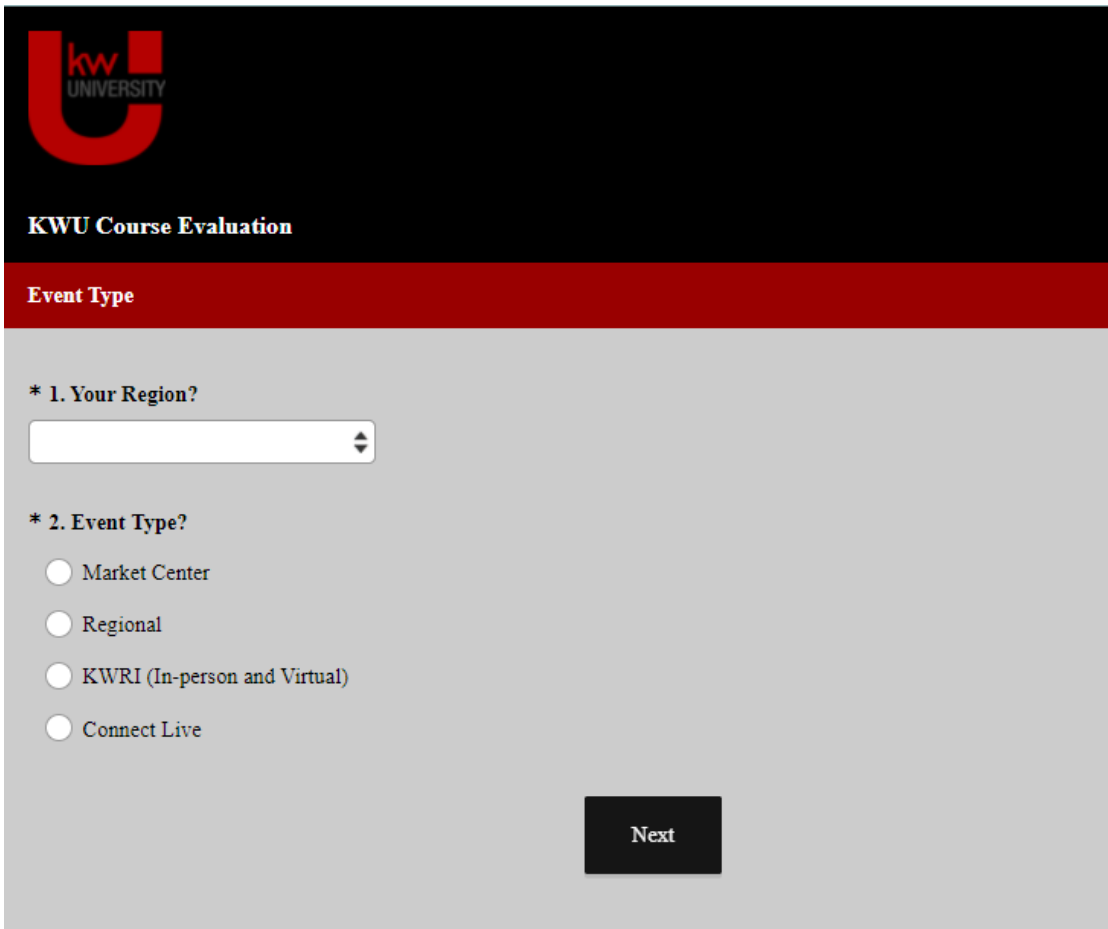
It's about the experience and the value you deliver, sustain the relationship.

Thank you for attending this course!

Please complete the evaluation.

To complete the evaluation:

1. Go to **KWUeval.com**
2. Select applicable information, including the Course and Instructor
3. Share your feedback



The screenshot shows the KWU Course Evaluation form. At the top left is the KWU logo (a red 'U' with 'kw UNIVERSITY' inside). Below the logo is the text 'KWU Course Evaluation'. A red horizontal bar contains the text 'Event Type'. The main form area is light gray and contains two questions:

* 1. Your Region?

* 2. Event Type?
 Market Center
 Regional
 KWRI (In-person and Virtual)
 Connect Live

At the bottom center of the form is a black button with the text 'Next'.

Thank you!

POST-WORK

SLIDE #92

In this chapter ...

- Customer Experience Management
- CX Book Club

Instructor:

Do not cover this material. It is for the student only to continue progressing with their Customer Experience improvement plan.

Post-work is to make sure the participant continues to be knowledgeable and continue working on CX standards and systems. They can track and measure their customer's experience. Customer Experience Management (CXM) involves the strategy and systems that focus on building your business around the wants and needs of your clients. Be purposeful and accountable with information you have gathered today—adopt CX standards and systems into your business.

Start small, put together a timeline, and we want to hear about what you are doing and how it is benefiting you and your customers.

What is your timeline to ...?

- *Update your Value Proposition*
- *Incorporate how you will deliver a wow customer experience to your customers into your Value Proposition.*
- *Build and adopt CX Systems.*
- *Develop and adopt customer experience standards and systems that work for you and for your customers. As our Mega Agents said throughout their interviews, it is not hard if this is your passion.*

Customers—Always Come First!

Start a CX book club for fun—knowledge is power!

Customer Experience Management

Utilizing the information you have put together in “My Customer Experience System,” start customizing standards and systems for yourself, your team, and your vendors to ensure customers will think of YOU and Keller Williams Realty for their real estate needs and you begin benefiting from repeat customer and referrals!

Update Your Value Proposition

 Complete by:

Date: _____

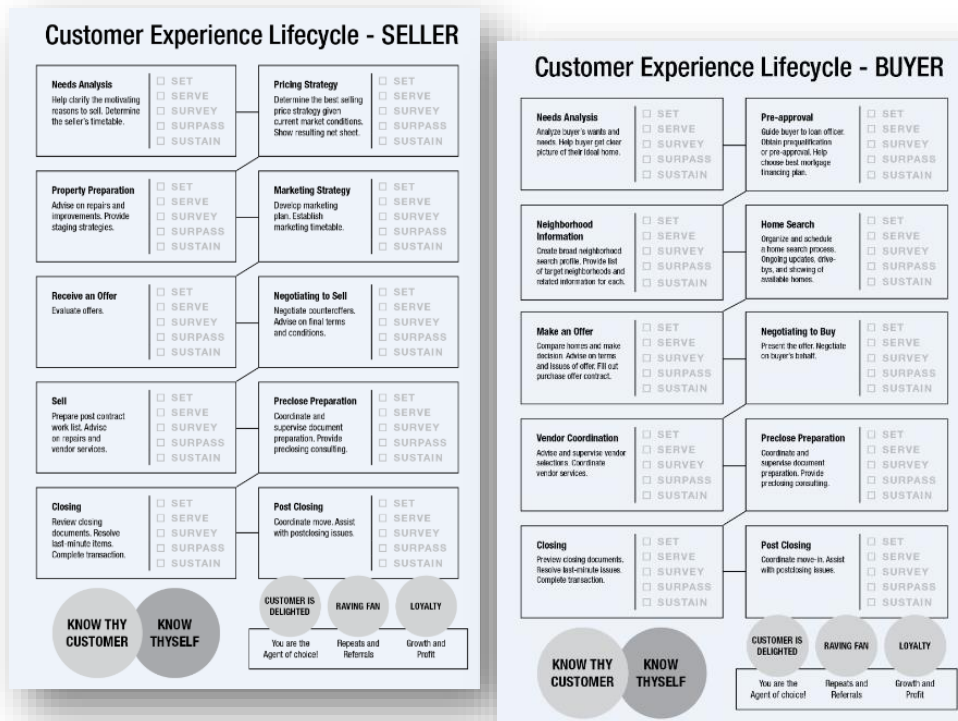
Incorporate how you will deliver a wow customer experience to your customers into your Value Proposition.

CX Standards and Systems

 Complete by:

Date: _____

Develop and adopt customized customer experience standards and systems throughout the CX Lifecycle with the Five-S Model.



Measure



Complete by:

Date: _____

- Develop and implement a process for surveys, reviews, and testimonials for customers.
- Track your repeat customers and referrals.
- Determine what’s working and what is not.

Do as Gary Keller says, “Inspect what you expect.”

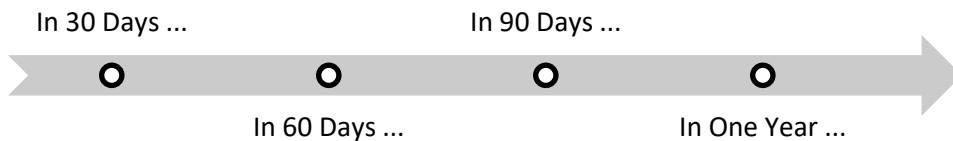
Stay Top of Mind

Manage your database and put all of your contacts on a 33 Touch. Implement a system to maintain and continue relationships with your customers.



Complete by: **Create a Timeline for Implementation**

Date: _____



Who can I ask to help me be accountable?

In 30 days, I will complete:

In 60 days, I will complete:

In 90 days, I will complete:

CX Book Club

Consider creating a Customer Experience book club with other agents to keep you sharp and always improving.



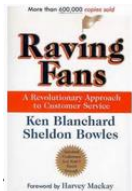
Peter Chabris began a book club with his team to help their business grow by 25 percent per year. Their challenge was to focus on the client experience, so he bought ten copies of the book *Raving Fans* and gave them to his team.

“At our weekly sales meeting, we met 30 minutes early and reviewed a chapter of the book with each other. In the last exercise, we asked our team to write a detailed raving fan review of their part of the transaction. Then we all read each other’s. These became the framework for our new checklist—our new customer experience systems.

‘Since we’ve implemented our system, it has been game changing, and now it’s not only a win, but it’s fun!’

Recommended Customer Experience Books

Raving Fans

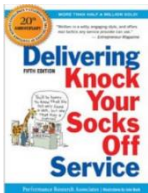


Authors: Ken Blanchard and Sheldon Bowles

"Your customers are only satisfied because their expectations are so low and because no one else is doing better. Just having satisfied customers isn't good enough anymore. If you really want a booming business, you have to create Raving Fans."

Written in the parable style of *The One Minute Manager*, *Raving Fans* uses a brilliantly simple and charming story to teach how to define a vision, learn what a customer really wants, institute effective systems, and make Raving Fan service a constant feature—not just another program of the month.

Delivering Knock Your Socks Off Service



Author: Performance Research Associates

Provides readers with proven tips and strategies for exceeding customer needs and expectations, determining the right times to bend or break the rules, becoming fantastic fixers and powerful problem-solvers, using the RATER factors to wow your customers, understanding cultural and generational differences, becoming a listening post and coping effectively with "customers from hell." With people surrounded by more choices and information than ever before, true customer loyalty has become increasingly difficult to attain. This book combines timeless wisdom and up-to-the-minute methods.

The Starbucks Experience



Author: Joseph A. Michelli

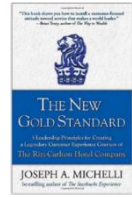
WAKE UP AND SMELL THE SUCCESS! You already know the Starbucks story. Since 1992, its stock has risen a staggering 5,000 percent! The genius of Starbucks, success lies in its ability to create personalized customer experiences, stimulate business growth, generate profits, energize employees, and secure customer loyalty—all at the same time.

The New Gold Standard

Author: Joseph A. Michelli

The Ritz-Carlton Hotel Company. Granted unprecedented access to the company's executives, staff, and its award-winning Leadership Center training facilities, bestselling author Joseph Michelli explored every level of leadership within the organization. He emerged with the key principles leaders at any company can use to provide a customer experience unlike any other, such as:

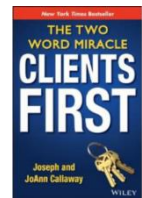
- Understanding the ever-evolving needs of customers
- Empowering employees by treating them with the utmost respect
- Anticipating customers' unexpressed needs and concerns
- Developing and conducting an unsurpassed training regimen



Clients First

Authors: Joseph and JoAnn Callaway

This book outlines a powerful path to riches that authors Joseph and JoAnn Callaway used to sell a billion dollars in real estate in just ten years—a feat never before achieved. Here, they explain the three keys to putting your clients first that helped them create one of the most successful realty firms in the United States. Each of the three keys is important and can stand on its own.

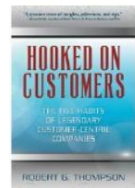


Hooked on Customers

Author: Robert G. Thompson

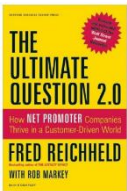
Combining his own professional experiences working as a CEO with his extensive research and expertise as an international authority on customer-centricity, author Robert Thompson has identified the five routine organizational habits successful customer-centric businesses use when executing strategy. Legendary, leading customer-centric businesses:

- LISTEN to their customers' values and feedback
- THINK about the implications of fact-based decisions on customers
- EMPOWER employees with the freedom they need to please customers
- CREATE new value for customers, without being asked
- DELIGHT customers by exceeding their expectations



The Ultimate Question 2.0

How Net Promoter Companies Thrive in a Customer-Driven World



Author: Fred Reichheld with Rob Markey

The Ultimate Question 2.0 explains how Apple, Amex, Intuit, Zappos and others are using a simple P&L accounting approach to customer relationships (profit-generating ‘promoters’ minus loss-making ‘detractors’) to thrive in a customer-driven world by building ‘good profits’ through profitable relationships with loyal fans. AKA the ‘Net Promoter System’.

Customer-centricity is the path to growth because it drives customer loyalty. Customer-centricity is the path to growth because it drives customer loyalty. “Why do we want loyal customers? Because loyal customers come back more often, buy additional products and services, refer their friends, provide valuable feedback, cost less to serve and are less price sensitive”.

Further Your Customer Experience Education

KW MAPS Coaching— A Jaw-Dropping Customer Experience

Double your referrals by delivering a 'jaw-dropping' Customer Experience and see your customer relationships and profits flourish!

Welcome to the age of Customer Experience. Great customer service is no longer a differentiator. What will you do to create an unforgettable - and highly referable - customer experience?

<http://www.mapscoaching.kw.com/cx>

Hear it Direct

Bring a LIVE Hear it Direct Consumer Panel Conference to your office or region, Sue Adler can make that happen!! Just reach out to her at SAdler@hearitdirect.com

APPENDIX

Instructor:

Timing for this chapter: (34 pages)

This appendix includes customer experience resources that are available to assist them in building their systems and creating an exceptional customer experience for their customers!

In this chapter ...

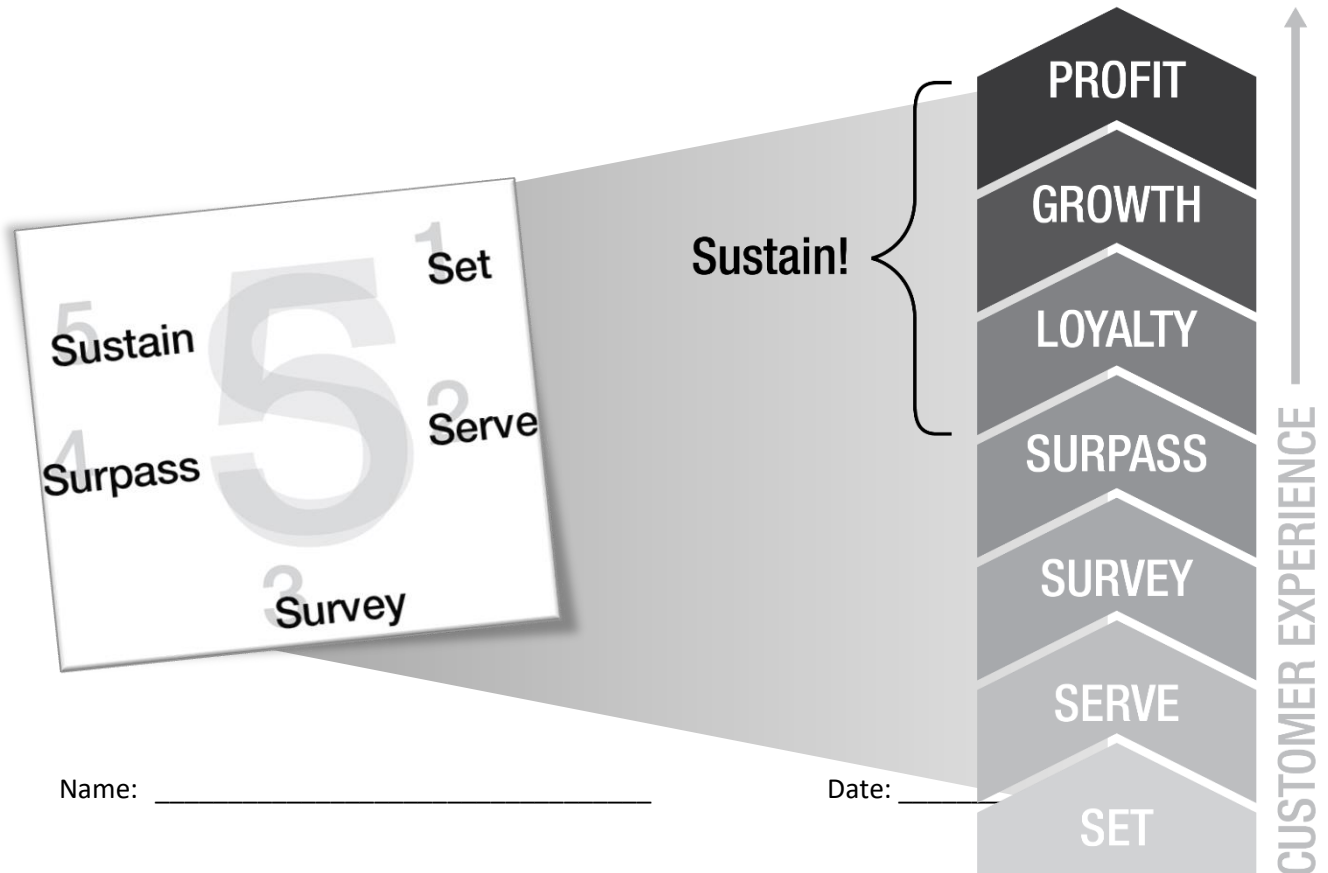
- Customer Experience System Workbook
- Survey Examples
- System Examples
- Customer Experience Resources

My Customer Experience System

Workbook



Raving fans for life!



Name: _____

Date: _____



Your CX System Workbook

This workbook is for you to plan and track how you bring value to your customer and deliver an exceptional customer experience for your customers. With this information, you can incorporate the **Five-S Model** into your business and create a great customer experience that will delight your customers, exceed their expectations, increase your repeats and referrals, and make you their agent of choice!

SYSTEM

noun sys•tem \ 'sis-təm\

: a group of related parts that move or work together

STANDARD

noun stan•dard \ 'stan-dərd\ : a level of quality, achievement, etc., that is considered acceptable or desirable

standards : ideas about morally correct and acceptable behavior

: something that is very good and that is used to make judgments about the quality of other things



My CX System: Know Thy Customer

Chapter 1

Portrait of my customer today

What value do I bring to my customer?



My CX System: Know Thyself

Chapter 1

How will I incorporate delivering an exceptional experience in my Value Proposition?

How will I take my customer experience from E to P?



Top real estate agents always have a clear understanding on why they should be hired.

My CX System: ¹Set

Chapter 2

How will I set and exceed expectations for my customer in each step of the CX Lifecycle?

	Buyer	Set Expectations	Exceed Expectations
1	Needs analysis		
2	Prequalification or preapproval		
3	Neighborhood information		
4	Home search		
5	Making an offer		
6	Negotiating to buy		
7	Vendor coordination		
8	Pre-close preparation		
9	Closing		
10	Post-closing		
	Seller	Set Expectations	Exceed Expectations
1	Needs analysis		
2	Pricing strategy		
3	Property preparation		
4	Marketing strategy		
5	Receiving an offer		
6	Negotiating a sell		
7	Selling		
8	Pre-close preparation		
9	Closing		
10	Post-closing		



My CX System: ²Serve

Chapter 3

How will I ensure that I do what I say and do it well?

General Standards			
1		6	
2		7	
3		8	
4		9	
5		10	
Communication Standards			
1		5	
2		6	
3		7	
4		8	
Mindset and Image Standards			
1		3	
2		4	
Technology Standards			
1		4	
2		5	
3		6	
Standards for Vendors			
1		3	
2		4	
Standards for Teams			
1		4	
2		5	
3		6	



My CX System: ³Survey



Chapter 4

How and when will I check in with my customer?

- Call and ask _____ (when/how often).
- Ask them to complete a survey _____ (when).

What questions would you like answers to?

1. _____
2. _____
3. _____
4. _____
5. _____

- Ask for a testimonial _____ (when).

What will you do with the testimonial?

- Put on website _____ (when).
- Put on social media _____ (when).
- Put on marketing collateral _____ (when).
- Ask them to post on social media/Yelp _____ (when).
- Ask for referrals _____ (when/how often).
 - How will I track referrals? _____
 - How will I reward for referrals? _____

What resources am I currently lacking to put these survey steps in place?

Who will I get help from to get these completed?



My CX System: ⁴Surpass



Chapter 5

How will I ...

- Continue to enhance my customer's experience and bring unexpected value to them?

- Always prepare customers for what comes next?

- Do unexpected things in unexpected ways?

- +1 Factor—do one unique and special thing?

What standards and systems will I implement for myself, my team, and my vendors to ensure surpassing customer expectations?

You do not have to do ten phenomenal things. One delightful or surprising thing should almost always be memorable.



My CX System: ⁵Sustain



Chapter 6

The customer experience does not end at closing, so how can I stay relevant in the customer's mind?

List opportunities for sustaining the relationship with my customer:

1. _____
2. _____
3. _____
4. _____
5. _____

TOP OF MIND

: foremost in one's thoughts; of greatest concern or priority.

How will I remain "top of mind" forever?



The sky is the limit!



Customer Experience Lifecycle - SELLER





Customer Experience Lifecycle - BUYER

Needs Analysis
Analyze buyer's wants and needs. Help buyer get clear picture of their ideal home.

- SET
- SERVE
- SURVEY
- SURPASS
- SUSTAIN

Pre-approval
Guide buyer to loan officer. Obtain prequalification or pre-approval. Help choose best mortgage financing plan.

- SET
- SERVE
- SURVEY
- SURPASS
- SUSTAIN

Neighborhood Information
Create broad neighborhood search profile. Provide list of target neighborhoods and related information for each.

- SET
- SERVE
- SURVEY
- SURPASS
- SUSTAIN

Home Search
Organize and schedule a home search process. Ongoing updates, drive-bys, and showing of available homes.

- SET
- SERVE
- SURVEY
- SURPASS
- SUSTAIN

Make an Offer
Compare homes and make decision. Advise on terms and issues of offer. Fill out purchase offer contract.

- SET
- SERVE
- SURVEY
- SURPASS
- SUSTAIN

Negotiating to Buy
Present the offer. Negotiate on buyer's behalf.

- SET
- SERVE
- SURVEY
- SURPASS
- SUSTAIN

Vendor Coordination
Advise and supervise vendor selections. Coordinate vendor services.

- SET
- SERVE
- SURVEY
- SURPASS
- SUSTAIN

Preclose Preparation
Coordinate and supervise document preparation. Provide preclosing consulting.

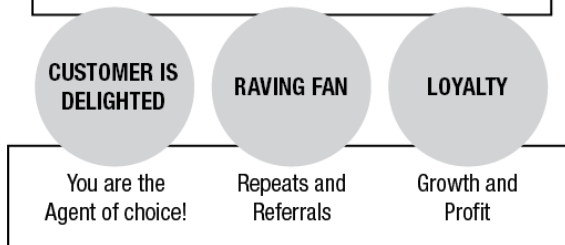
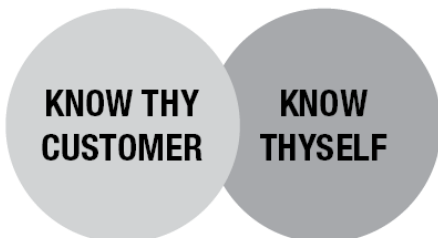
- SET
- SERVE
- SURVEY
- SURPASS
- SUSTAIN

Closing
Preview closing documents. Resolve last-minute issues. Complete transaction.

- SET
- SERVE
- SURVEY
- SURPASS
- SUSTAIN

Post Closing
Coordinate move-in. Assist with postclosing issues.

- SET
- SERVE
- SURVEY
- SURPASS
- SUSTAIN



Survey Examples:



Client Satisfaction Survey

To:

From:

We worked together on a project of utmost importance to you—the sale of your home. Please help me serve you and your friends better by taking a few minutes to complete this survey. If you wish to talk to me directly, don't hesitate to call me at _____. For your convenience, I am enclosing an addressed and stamped envelope.

Directions: Please rate your level of agreement with these statements: 1 = Strongly Disagree, 10 = Strongly Agree.	☹					☺				
	1	2	3	4	5	6	7	8	9	10
1. I delivered on what I promised.										
2. I was accessible when you contacted me.										
3. I listened.										
4. You are willing to recommend me to others.										
5. You would use me again if you needed a real estate agent.										
6. If you were in charge of my business, what's one thing you'd change?										
7. What did I do well?										
8. May I include your comments in my marketing materials? <input type="checkbox"/> Yes <input type="checkbox"/> No										

Thank you!



Client Satisfaction Survey - Team

To:

From:

We worked together on a project of utmost importance to you—the sale of your home. Please help me serve you and your friends better by taking a few minutes to complete this survey. If you wish to talk to me directly, don't hesitate to call me at _____. For your convenience, I am enclosing an addressed and stamped envelope.

Directions: Please rate your level of agreement with these statements: 1 = Strongly Disagree, 10 = Strongly Agree.	☹					☺				
1. My team delivered on what I promised.	1	2	3	4	5	6	7	8	9	10
2. We were accessible when you contacted me.	1	2	3	4	5	6	7	8	9	10
3. We listened.	1	2	3	4	5	6	7	8	9	10
4. Our services exceeded your expectations	1	2	3	4	5	6	7	8	9	10
5. You would enthusiastically recommend us to others.	1	2	3	4	5	6	7	8	9	10
6. You would use us again if you needed a real estate agent.	1	2	3	4	5	6	7	8	9	10
7. If you were in charge of my business, what's one thing you'd change?										
8. What did we do well?										
9. What person on my team stood out to you during your transaction? In what way(s)?										
10. May I include your comments in my marketing materials? <input type="checkbox"/> Yes <input type="checkbox"/> No										
11. Who do you know who is interested in buying or selling real estate?										

Thank you!

System Examples

The following system examples are from Monica Reynolds. To learn more about Monica's standards and systems, we highly recommend you take her classes that are held several times throughout the year.

Systems:

1. Pass the Baton
2. Assistant First Call Checklist
3. Three-Week Honeymoon of Communication Checklist

PASS THE BATON

Creating the Perfect Customer Experience: Pass the Baton Correctly to Your Assistant

- 1. Motivation: _____
Happy?: _____ Sad?: _____
- 2. Date to Go on the Market: _____
- 3. Loan Balance: _____
- 4. HOA / Name and Company: _____
HOA Fee: _____ HOA Number: _____
- 5. List Price: _____

	YES	NO	
<input type="checkbox"/> 6. Buyer			
<input type="checkbox"/> 7. Sign			
<input type="checkbox"/> 8. Professional Photos			
<input type="checkbox"/> 9. MLS Date: _____			
<input type="checkbox"/> 10. Just Listed			
<input type="checkbox"/> 11. Fliers			
<input type="checkbox"/> 12. 1-800 Home Info Hotline			
<input type="checkbox"/> 13. Mobile App Download			N/A: _____
<input type="checkbox"/> 14. Termite Inspection Ordered			Current Pest Company: _____
<input type="checkbox"/> 15. Seller Relocation			Where?: _____ When?: _____
<input type="checkbox"/> 16. Referral Agent			Agent: _____
<input type="checkbox"/> 17. Lockbox			Date: _____
<input type="checkbox"/> 18. Pets			Names / Notes: _____
<input type="checkbox"/> 19. Kids			Names / Ages: _____

- 20. Showing Instructions: _____
- 21. Special Instructions: _____
- 22. Property Features/Notes: _____

Assistant's First Call Checklist

Seller: _____

Date: _____

Address: _____

Phone: _____

Source of Business: _____

Email: (H) _____

Email: (W) _____

Communication Style of Wife: _____

Communication Style of Husband: _____

Good morning, this is _____ with _____'s office. (Agent's name) asked that I call you as part of our customer service and introduce myself. Is this a good time to talk? I am the listing manager, and I will be handling all the paperwork. Did you receive my card? Great, I work Monday through Friday, and I will always be available for your questions.

Check this off as you mention them on the first call.

_____ 1. Business Card

_____ 7. Business Hours

_____ 2. Tuesday and Friday Call Communication

_____ 8. Arch Telecom

_____ 3. Showings (how it's handled/feedback)

_____ 9. Missing Paperwork

_____ 4. Website

_____ 10. Referral

_____ 5. Sign Info

_____ 11. Email
(personal/work..husb./wife)

_____ 6. MLS Printout

_____ 12. Disney Close

I will call you weekly on Thursdays between 1:00 and 2:00 to give you a market update. What phone number would you like me to use? Great. Also, as part of my job, our business is based on referrals. Do you know anyone that could use our services?

Thank you for working with our TEAM. We appreciate your business. Is there anything else I can do for you at this time to help you?

Have a great day!



The Perfect Real Estate Assistant—v4.0

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Three Week Honeymoon of Communication

Week 1

- ___ 1. Assistant introduction call within 24 hours using First Call checklist.
- ___ 2. Thank you for listing letter with all signatures of team.
- ___ 3. Buyer agent(s) or office to preview within 48 hours.
- ___ 4. Agent to call and say thank you/ask for referrals within first 5 days.
- ___ 5. Letter with copy of MLS printout sent by mail to seller.
- ___ 6. Assistant to call seller and provide code for their property for Arch Telecom to hear the recorded message.
- ___ 7. Sign up within 24 hours.

Week 2

- ___ 1. Assistant call to review MLS printout and disclosures. Check for mistakes.
- ___ 2. Email links to personal website, MLS website, KW website, Zillow, Realtor.com.
- ___ 3. Agent to call and review showings (including feedback) or lack of showings.
- ___ 4. Assistant to send out email link to top 50 agents (and copy seller).
- ___ 5. Email sent to entire database of new listing with copy to seller.
- ___ 6. Assistant to call top 10 agents in area.

Week 3

- ___ 1. New CMA sent with monthly stats sent for area and county.
- ___ 2. Send a copy of the Action Plan with checkmarks that all items are completed.
- ___ 3. Send a copy of the Arch Telecom call log for seller's review.
- ___ 4. Send an Internet report of number of hits on Internet sites and on their property for seller's review.
- ___ 5. Agent or Assistant to call for price reduction and review showing results or lack of showings.
- ___ 6. NEGOTIATE OFFER ON PROPERT.

The Perfect Real Estate Assistant—v4.0

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Customer Experience Resources

The following is a collection of customer experience resources.

CX Toolkit Steps



Listed below are the steps to find CX resources available in our toolkit.

Steps to view resources in our CX Toolkit

1. Login to [KWConnect.com](https://www.kwconnect.com),
2. Search **Courses** for **Customer Experience**.
3. Click on **Course Materials**.
4. Click on a **toolkit** item to download.

CX Toolkit Resources

My CX Systems Workbook

CX Management

CX Book Club

Survey Examples

- 1) Client Satisfaction Survey
- 2) Team Client Satisfaction Survey

System Examples

- 1) Pass the Baton
- 2) Assistant's First Call Checklist
- 3) Three-Week Honeymoon of Communication

Job Aids

- Be Personal and Emotional
- CX Lifecycle Buyer
- CX Lifecycle Seller
- CX System Examples
- Exceed the Customer's Experience
- Generation Communication
- Important Words in CX Tips
- Net Promoter
- Pass the Baton
- Report First Impressions Matter
- Social Media Tips
- Tips for Effective Communication
- Tips for Resolving Conflict
- 7 Critical Points in the Mortgage Process for Realtors

Other Resources

Ignite Toolkit Steps

Located in the Ignite toolkit are many valuable tools you could use to enhance the customer experience. Listed below are the steps to find the Ignite Toolkit:

1. Login to [KWConnect.com](https://www.kwconnect.com),
2. Search **Courses** for **Ignite**.
3. Click on **Student Materials**.
4. Click on a **toolkit** item to download.



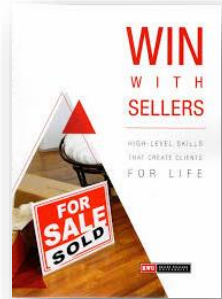
Ignite Toolkit Resources

- Listing Consultation Checklist
- Buyer 10+ Experience Questionnaire
- Buyer Consultation Questionnaire
- Contract-to-Close Issues and Solutions
- My 10+ Customer Service (Experience) Agreement for Sellers
- My 10+ Customer Experience Agreement for Buyers
- Prioritizing Needs

Win with Sellers Toolkit Steps

Located in the Win with Sellers Toolkit are many valuable tools you could use to enhance the customer experience. Listed below are the steps to find the Win with Sellers Toolkit:

1. Login to [KWConnect.com](https://www.kwconnect.com),
2. Search **Courses** for **Win with Sellers**.
3. Click on **Course Materials**.
4. Click on a **toolkit** item to download.



Win with Sellers Toolkit Resources

- Agent Interview Questions
- Prelisting Lead Sheet
- Contract to Close Checklist
- Contract to Close Issues
- Sample Preferred Vendor List
- Service Model Table
- Touch Ideas

MREA Operation Manual

Obtain the MREA systems and all the customizable forms you need in the *MREA Operations Manual & Forms* at [KWConnect.com](https://www.kwconnect.com).



Win with Buyers

Located in the Win with Buyers Toolkit are many valuable tools you could use to enhance the customer experience. Listed below are the steps to find the Win with Buyers Toolkit:

1. Login to [KWConnect.com](https://www.kwconnect.com),
2. Search **Courses** for **Win with Buyers**.
3. Click on **Course Materials**.
4. Click on a **toolkit** item to download.



Win with Buyers Toolkit Resources

- Agent Contract to Close Tasks and Responsibilities
- Buyers Guide
- Customizable Buyer Lead Sheet
- Suggested Contents for Your Preconsultation Packet and Buyer Guide

KWConnect Video

From KWConnect, search for "customer experience" or "wow experience." Listed below are the steps to find customer experience videos.

1. Login to **KWConnect.com**.
2. Search **Courses** for **Customer Experience**.
3. Click on **Videos**.

CX Videos:

- CX Course Video

Hear It Direct Videos – Sue Adler

- Welcome to the Experience Economy
- The Information Age
- Agent Case Study
- Buyer Consultation
- Of Course I Know What My Clients Want!
- MYTH: Of Course They Will Write Me a Review; BUSTED: Only if the Experience was Awesome or Awful
- MYTH: My Sellers Know They Are My Highest Priority; BUSTED: Their Perception is Their Reality
- MYTH: They'll Remember Me When They Go to Sell; BUSTED: Only if you're Still Top of Mind!

Other:

- Clients First: Gary Keller talks with Joseph and JoAnn Callaway (time 30:03).

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