

Post Closing Drill

PAST CUSTOMER FOLLOW UP SYSTEM. GUARANTEED TO INCREASE YOUR REFERRAL BUSINESS.
THIS IS A MUST FOR EVERY CLOSING THAT YOU DO.

- 1) On the day of the closing we recommend a simple thank you gift. Ideas include surprise your satisfied clients with Champagne, glasses, Thank You card and Two professional housecleaning personnel on their closing date for \$100 (your cost). You may consider any number of closing gifts. Gift baskets are nice but make it personal. You need to do something memorable. Many Realtors personalize a brass doorknocker with the family name.
Ordered: 7 days prior to closing Delivered: At closing or during move in
- 2) At the closing table, you must review the entire file and ensure all FREC or RESPA required documentation is in your file. Also it is required that you have copies of inspection reports in your file for E&O claims. If you do not know what documents are required talk to your Broker or Sales Manager for a complete checklist.
- 3) Mail, Hand Deliver or Email Satisfaction Survey <http://www.associateworx.com/customerfirst/voice-of-customer.html>
- 4) After your file is FREC & RESPA compliant, you will want to hold yourself accountable to obtaining your clients forwarding address. You will be well served to obtain all of the information prior to leaving the closing table. (HINT: if you have good rapport with the co op client we recommend you add them to your database as well.
- 5) First enter your clients forwarding contact information into your EXCEL or other contact management database. IT IS REALLY EASY. Do not avoid this simple learning curve any longer. Make sure all of your past clients are available at the push of one button. Mailing labels need to be printable in a minutes notice. MAIL MERGING and Preprinted envelopes will project the image you need to be competitive in residential real estate.
- 6) BEFORE you submit your check request! Handwrite a thank you card short but sweet! Mail on the closing date!
- 7) Before you submit your check request! Hand address or preprint an envelope for your customer satisfaction survey and lick it stamp it stuff at and set aside for mailing within 5 days.
- 8) Before you submit your check request! Hand address or preprint an envelope for your Homestead reminder letter. MAIL MERGE it, lick it, stamp it, stuff it and set it aside for mailing within 45 days after closing.
- 9) Hand address or preprint an envelope for your holiday greeting card. Sign it, lick it, stuff it put it in a box for December 1 mailing on December 1 stamp it and mail it with all of your others that you accumulated in a safe place throughout your year.
This ritual is integral to your past customer plan!
- 10) Hand address or preprint an envelope for your Tax Ramifications reminder. Mail Merge it. Lick it, stuff it with a copy of your card and their closing statement. Set it aside in a safe place for mailing and stamping January 10 the following year. On Jan 10 deliver all of your post closing drill Tax Ramification reminders to the post office. This ritual is integral to your past customer plan!
- 11) Every month you should include your consumers in a postcard or letter campaign. Bare min. of 6 X per year. If you can't commit to that you need to go get another job, that provides more structure and accountability because you may have a hard time making it in the real estate business.
- 12) There are automated solutions for past customer follow up that you can explore on magicalcommunications.com OR postcardmania.com OR directmailsolutions.com. . . you will be shocked at the value and opportunities for automated direct mail solutions if you browse the internet keyword DIRECT MAIL.
- 13) We recommend that you telephone or visit your past client no less than 2 X per year forever to solidify your place in their consciousness.

Past Customer Follow Up via this Post Closing Drill will add several deals per year to your production.

Use some incentive to ensure completion.

We suggest withholding your own commission checks until the Post Closing Drill is complete.