

# Delivering on the One-Stop- Shopping Promise

By Andrea Zimmerman

**O**ne-stop shopping promises a simpler and better experience for home buyers and sellers. When real estate agents are able to deliver on this promise, they achieve greater referrals through increased client satisfaction. Whether you are already using your brokerage's in-house services, such as mortgage and title, or are thinking about it, service delivery is a critical consideration to fully realizing your one-stop shopping competitive advantage.

Consider past clients' use of your in-house services. On a scale of one to 10 (10 being best), at what level did your clients experience a simpler, better home purchase or sale? Interested in improving your score? There are a number of simple actions you can take. A great one-stop-shopping experience isn't just about introducing clients to your mortgage and title specialists—it's about working closely with your in-house team to:

1. Establish clear and mutual expectations.
2. Commit to positive, one-stop communication.
3. Meet regularly!

## 1 Establish Clear and Mutual Expectations

A common reason for not using in-house brokerage services is

a bad past experience—either your own or someone else's. We know mistakes can happen on the road to homeownership. Most often, the issue isn't simply that the error occurred, it is about how it was handled with you and your client.

To improve your team's capability to deliver a simpler, better experience, together write a set of ground rules for how you will work with each other and clients. Your conversation might include:

- ▶ When and how will the team members approach each other's clients?
- ▶ How will a prospect be introduced to each of the services?
- ▶ What is each team member's client philosophy—how should clients be treated?
- ▶ What is each team member's preferred method of contact (sending

and receiving)—e-mail, phone, in-person, etc.?

- ▶ When and how will each member get updated on the other team member's client status? What will be included in the status update?
- ▶ What is the protocol when questions or issues arise?
- ▶ How quickly will you respond to each other's phone calls/e-mails—how about client communications?
- ▶ What client satisfaction level will the team maintain? Do you work to meet—or exceed—expectations?
- ▶ How often will the team meet to discuss the status of current business and how well expectations were met with past clients?

## 2 Commit to Positive, One-Stop Communication

Great one-stop shopping delivery starts with thinking about what your client wants and needs to hear. Clients want to move through the home purchase quickly with as little effort as possible—the stresses with packing up and



## business development

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moving are effort enough. They would prefer problems are dealt with before they hear about them. If an issue comes up, they want it resolved as quickly as possible with as little involvement as possible. Clients want to go to one person to find out what is going on—not make five phone calls to try to piece things together. Here are strategies to improve your one-stop shopping delivery:

▶ **Knock Down the Walls!** Eliminate any we/them mentality that exists and operate as one collective team. Start by getting on the same page

regarding what you are collectively trying to deliver. The language we use is important in creating change. Agree to find opportunities to reinforce verbally and through e-mails that you are all part of the same team working to deliver the same outcome.

▶ **Be Positive!** In-house representatives often complain they “work in a fishbowl”—that missteps, regardless of size or truth tend to be amplified more loudly in the office than what any external provider might experience. Give your clients a better total experience by

working together to eliminate office “noise” if a problem comes up.

▶ **Collective Accountability!** If a problem arises in their home sale or purchase, clients look to their Realtor to help fix it—regardless of whether it is originating from an external or internal service. If the loan officer, title representative and/or Realtor are finger pointing at each other or somewhere else, it reflects badly on the whole team. The client cares most about resolution, not the cause of the problem. A successful delivery team takes collective accountability, backs each other up, and focuses on taking care of the issue, regardless of its origin.

▶ **One and Done.** Commit to having a good understanding of where the client is in the entire process—that way if a client calls any one team member, they can get a “one-stop”

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update. Agree not to push the client to yet another phone number—do the leg work for them and follow-up. You have an advantage if your company offers a transaction management system—check into the benefits if you haven't already.

► **Manage the Handoff.** Talk about how your client is "handed-off" between team members. When do hand-offs occur? What is or should be communicated? Does each team member follow-up with the client to make sure client needs were met? Have the team commit to an educated, positive hand-off with a great follow-up process—practice together.

### 3 Meet Regularly

Relationships are developed and cemented by proximity and contact—the more you meet and work together, the better your clients' one-stop shopping experience. Whether by e-mail, phone or face-to-face, agree to touch base at least weekly to discuss active clients and prospects. Commit to meeting face-to-face as a team for an hour at least monthly—talk about: marketing strategies, market conditions, ser-

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vice levels, prospects, deals in process, new products and program changes, legal changes, etc.

Your ability to fully realize your one-stop shopping competitive advantage is dependent on your team's collective ability to deliver on the promise of a simpler, better experience. As the real estate agent, you are in the leadership role—take the initiative to bring your in-house team together. By delivering a seamless one-stop shopping experience, you will enhance your clients' satisfaction and increase your success!

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