

Build Your Business & Reduce Risk One Satisfied Customer At A Time

(Adjusting YOUR approach to meet THEIR changing needs & lifestyle)



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Timeline

Introduction	5 min
1. Today's consumers-researching home buying information	5 min
2. Making your services 'customer-service-friendly'	10 min
3. The right tools for the job	25 min
4. Staying Connected with your customer	25 min
5. Professionalism and Branding	10 min
6. Reduce your risk on the Internet	20 min
Total	100 min
	2 hours CE

Course Objectives

At the end of this program, the student will be able to:

- Identify the resources that their customers use to gather home buying or selling information
- Identify the tools you need to reach your customer effectively
- Describe how today's buyer and seller want to communicate
- List several ways to stay connected to your customer
- Explain key elements to a professional image to the public
- Describe how the Code of Ethics addresses marketing real estate properties.
- Explain how to keep your customer's personal information secure.

Meeting the needs of today's buyer or seller

Welcome to class! If you have been in the real estate business for any numbers of years, I'm sure you'll agree with me that things have changed! Not only has the real estate market changed, but the way we do business has changed. And, more importantly, the way our **CUSTOMERS EXPECT** us to do business has changed. 'Keeping up with technology' is no longer a hobby, but a necessity if we are to meet the needs of today's home buyer or seller. They expect more service, more communication and more accessibility to us. This program reviews the necessary tools to not only maintain that 'personal touch' with our customers, but to make sure we have the right tools for that job, all while reducing our risk on the Internet and in our advertising. That way, we can provide **Exceptional Customer Service!**

1. Where are today's consumers researching home buying information?

According to recent NAR statistics, 9 out of 10 home buyers (of all ages) are turning to the Internet FIRST when searching for a Realtor and/or home buying information.

Is your website effective? Are you in compliance with current Department of Business and Professional Regulation guidelines and rules?



When reaching your customer through your website:

- Create Several Points of Entry – i.e. for both Buyers AND Sellers
- User-friendly to navigate (remember not ALL your customers are going to be computer savvy.)
- Customer testimonials
- Create a brand
- Use Social Media-CAREFULLY--(we'll talk about **minimizing your risk** in Chapter 6)

2. Making your services 'customer-service-friendly' to today's busy consumer? Are you 'bringing your office to them?'

Today's consumers are wired for instant gratification. You customer will expect immediate (if not sooner) response time from you. With all that they have scheduled into their busy lives, they are looking for a more 'time-friendly' solution. That's where you come in. In this section we'll discuss how, with the right tools, you can bring your office to THEM. You can meet them at THEIR location, on THEIR terms, when it is convenient for THEM. It's all about the customer, right? Now, here's how we kick that up a notch to top-drawer customer service...

Tools you'll need:

- Laptop
- Tablet
 - Video and Pictures (camera) on the tablet
 - General Business Management (email, etc.)
 - Wi-Fi versus 3G or 4G
 - Real Estate Specific Apps
 - Printing Ability
 - Battery Life
 - Portability
 - Personal Use
- Smart Phone
 - Many smart phones have many of the same features as tablets.
- Scanner (portable but could be replaced by a tablet)
- Wi-Fi access
- Fax or email ability

3. The right tools for the job

(hint – the tools YOUR CUSTOMER uses are the ones YOU should be using!)

You may FEEL like using a hammer on your laptop or iPad sometimes, but don't....Those are the very tools you need in today's world to **serve your customers effectively.**



Your customers have them...you should too.

- + Video and Pictures (camera) on the tablet
- + General Business Management (email, etc.)
- + Wi-Fi versus 3G or 4G
- + Real Estate Specific Apps
- + Printing Ability
- + Battery Life
- + Portability
- + Personal Use



The Mobile Office is more than a 'trend'

- + Revolutionary time of changing technology
- + More Professionals are becoming un-tethered from their desk
- + Companies leveraging technology to "give up" space
- + Wi-Fi (FREE) is everywhere
- + Have everything you need at your finger tips.....always

Why Mobile/Paperless Office?

- + The business is changing and will continue to change
- + Our businesses are changing every single day with new technology
- + Efficiencies are critical – we must be able to leverage our time
- + **Customers are becoming more educated and demanding**
- + **Effective communication** is critical to the success of any organization today.
- + Revolutionary time of changing technology
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Be able to do MORE for each customer

- + More opportunities to work
- + Work on your laptop “anywhere” with laser-focus
- + Take care of business anywhere
- + Maximize your time
- + Streamline processes

Security – Keeping your customers info secure

Encrypt or decrypt files of any type, including Microsoft Word, Excel and PDF documents. [MEO](#) allows you to protect your sensitive data against unauthorized viewers by utilizing the latest data encryption technologies. Keep your documents safe and secure with this free data encryption software.

This works for MAC or Window boxes and is \$ 29.99 for a single license.

How to Use your Table in Real Estate

- + OPEN HOUSE by WahSoft, LLC
- + Client Detail Reports with EverNote or Sign my pad.
- + Write and Sign contracts right from the iPad
- + Search MLS – beta testing tablet version + Mercury
- + RE Calc Mortgage Calculator
- + APPS – Realtor.com, WCR, Zillow

4. Staying Connected with your customer

The 'Personal' vs. 'Electronic' touch

As Realtors, we can all agree that communication with our customers is essential and critical to the success of our business. But did you ever stop and think about the BEST way to communicate with a customer? Are you communicating the way YOU like to? Or, did you take the time to ask them the best way to reach them.

You customers come from different walks of life and different generations. How many people do you know that never check their voice mail? How many leave you a message that just says, "call me"?

Whether texting, emailing, speaking on the phone, social media or directing a customer to your website, remember, it's always a reflection of YOU. So, regardless of HOW you communicate, be sure to make professionalism your goal, **(and your website DBPR compliant!)**

The 'Personal Touch' of top-level customer service – handwritten notes

- Leaves a positive impression
- Makes you stand out – who else is doing this?
- Makes clients feel like individuals
- People keep handwritten cards
- Allocate 30 minutes a day
- Keep stamped envelopes and cards in vehicle
- People do business with people who they like and trust. Who else would send a card?

The 'Technical touch' made personal.... i.e. Rapportive

Let me tell you why! On average, PT saves 3 hours a month- but this is for normal users- not REALTORS who live on their cell phones. I think PT has saved me at least 15 minutes a day. Which is 7.5 hours a month!

What it does, is this... Your callers call you- leave a message and within minutes you will get a text message with what the caller said- Perfect if you're like me--- you're with clients all day and you don't want to be rude to answer your phone. Now you can be with your clients- and glance at your phone message that was texted to you to

determine if you should step out and call them back. Typically you can just text them back the answer. Time saved!

You will also receive an e-mail with an audio file attached. Nice thing about this is – if you have e-mail capabilities on your phone, it will work just like a text message does. But that’s not all- with the e-mail (audio file) You can forward calls on to anyone- for example- you want your assistant to follow up- all you do is forward the message (saves you time from calling) You can forward on to your clients any responses they are waiting on... AND the nice thing is it’s coming straight from the other agent- you’re literally just the messenger- they can’t get mad at you any more ☺

The last and my favorite part is you can file the audio files with your client files. SO when something comes up, and the other agent, or your broker, or your client says... I didn’t say that.... Viola! You have instant CYA!!!! It’s fantastic!

Making it easier for your customer....

Technology now allows you to bring the documents **to them**, (or even MEET with them) making the home buying/selling process that much more user-friendly!

For Documents:	For video meetings/communication:
Sugar Sync DropBox Sign My Pad Pro Google Docs GoDoc	Skype UStream Broadcaster Videolicious

5. Professionalism and Branding:

Are you leaving the right impression?

How to get started...

- Get Your Brand Set
- Obtain a unique Domain(s)
- Create Your Website / Buy Website
- Use Free and Paid traffic Resources
- Leverage Video and Testimonials
- Link everything together
- Measure your success

Questions we must ask

- What Business Are We in?
- How do we attract customers?
- Am I set up for success?
- Do I have the systems I need to be successful?
- What is my plan when I leave here today?
- Am I in control of my business?

Brand – Who You Are...Professionally!!

- Public Profiles - Use 1 Profile, no more than 15 sentences or 500 characters
- Logo
- Slogan/Motto
- Photo - updated, brand appropriate

Your Business Card – Always have them, your customers will want one!!

- Must Have Items On Your Card
 - Website
 - QR Code going to squeeze page, website or vcard
 - FRESH headshot (not older than 4 years)
 - Request for “Referral”
- Strategy with Cards
 - Never give payment without a card
 - Keep Them Everywhere – Never be without one

6. Reducing Your Risk

With the advent of the Internet came website, URLs and social media. Initially we used this avenue to communicate with each other. Then we started using it for business as well. And as social media is still relatively new in some respects, we are still finding our way when it comes to the “Do’s and Don’ts.”

So how do Realtors reduce their risk on the Internet?

A. The National Association of Realtors Code of Ethics.

The Code of Ethics has several provisions that address advertising and other representations to the public. The rules in the Code are in addition to those already in the state statute or administration code.

Since 2007, NAR has made several changes to the Code, including Article 12 in order to make it clear that the Code applies in all scenarios and circumstances, regardless of the method used.

Standard 1-2 of the code says, “The duties imposed by the Code of Ethics encompass all real estate-related activities and transactions whether conducted in person, electronically, or through any other means.”

So let’s take a look at Article 12. The main requirement here is that the Realtor presents a true picture in advertising. The entire Article has been provided for your reference. Specifically, let’s look at **Standard 12-10** which was amended January of 2013.

Article 12

REALTORS® shall be honest and truthful in their real estate communications and shall **present a true picture in their advertising, marketing, and other representations.** REALTORS® shall ensure that their status as real estate professionals is readily apparent in their advertising, marketing, and other representations, and that the recipients of all real estate communications are, or have been, notified that those communications are from a real estate professional. (Amended 1/08)

- **Standard of Practice 12-1**

REALTORS® may use the term “free” and similar terms in their advertising and in other representations provided that all terms governing availability of the offered product or service are clearly disclosed at the same time. (Amended 1/97)

- **Standard of Practice 12-2**

REALTORS® may represent their services as “free” or without cost even if they expect to receive compensation from a source other than their client provided that the potential for the REALTOR® to obtain a benefit from a third party is clearly disclosed at the same time. (Amended 1/97)

- **Standard of Practice 12-3**

The offering of premiums, prizes, merchandise discounts or other inducements to list, sell, purchase, or lease is not, in itself, unethical even if receipt of the benefit is contingent on listing, selling, purchasing, or leasing through the REALTOR® making the offer. However, REALTORS® must exercise care and candor in any such advertising or other public or private representations so that any party interested in receiving or otherwise benefiting from the REALTOR®’s offer will have clear, thorough, advance understanding of all the terms and conditions of the offer. The offering of any inducements to do business is subject to the limitations and restrictions of state law and the ethical obligations established by any applicable Standard of Practice. (Amended 1/95)

- **Standard of Practice 12-4**

REALTORS® shall not offer for sale/lease or advertise property without authority. When acting as listing brokers or as subagents, REALTORS® shall not quote a price different from that agreed upon with the seller/landlord. (Amended 1/93)

- **Standard of Practice 12-5**

REALTORS® shall not advertise nor permit any person employed by or affiliated with them to advertise real estate services or listed property in any medium (e.g., electronically, print, radio, television, etc.) without disclosing the name of that REALTOR®’s firm in a reasonable and readily apparent manner. This Standard of Practice acknowledges that disclosing the name of the firm may not be practical in electronic displays of limited information (e.g. "thumbnails", text messages, "tweets", etc.). Such displays are exempt from the disclosure requirement established in the Standard of Practice, but only when linked to a display that includes all required disclosures. (Adopted 11/86, Amended 1/11)

- **Standard of Practice 12-6**

REALTORS®, when advertising unlisted real property for sale/lease in which they have an ownership interest, shall disclose their status as both owners/landlords and as REALTORS® or real estate licensees. (Amended 1/93)

- **Standard of Practice 12-7**

Only REALTORS® who participated in the transaction as the listing broker or cooperating broker (selling broker) may claim to have “sold” the property. Prior to closing, a cooperating broker may post a “sold” sign only with the consent of the listing broker. (Amended 1/96)

- **Standard of Practice 12-8**

The obligation to present a true picture in representations to the public includes information presented, provided, or displayed on REALTORS®' websites. REALTORS® shall use reasonable efforts to ensure that information on their websites is current. When it becomes apparent that information on a REALTOR®'s website is no longer current or accurate, REALTORS® shall promptly take corrective action. (Adopted 1/07)

- **Standard of Practice 12-9**

REALTOR® firm websites shall disclose the firm's name and state(s) of licensure in a reasonable and readily apparent manner.

Websites of REALTORS® and non-member licensees affiliated with a REALTOR® firm shall disclose the firm's name and that REALTOR®'s or non-member licensee's state(s) of licensure in a reasonable and readily apparent manner. (Adopted 1/07)

- **Standard of Practice 12-10**

REALTORS®' obligation to present a true picture in their advertising and representations to the public includes Internet content posted, and the URLs and domain names they use, and prohibits REALTORS® from:

1. engaging in deceptive or unauthorized framing of real estate brokerage websites;
2. manipulating (e.g., presenting content developed by others) listing and other content in any way that produces a deceptive or misleading result;
3. deceptively using metatags, keywords or other devices/methods to direct, drive, or divert Internet traffic; or
4. presenting content developed by others without either attribution or without permission, or
5. to otherwise mislead consumers. (Adopted 1/07, Amended 1/13)

- **Standard of Practice 12-11**

REALTORS® intending to share or sell consumer information gathered via the Internet shall disclose that possibility in a reasonable and readily apparent manner. (Adopted 1/07)

- **Standard of Practice 12-12**

REALTORS® shall not:

1. use URLs or domain names that present less than a true picture, or
2. register URLs or domain names which, if used, would present less than a true picture. (Adopted 1/08)

- **Standard of Practice 12-13**

The obligation to present a true picture in advertising, marketing, and representations allows REALTORS® to use and display only professional designations, certifications, and other credentials to which they are legitimately entitled. (Adopted 1/08)

Reducing your risk....

So, is a Realtor's FaceBook profile considered an advertisement or a real estate communication? First, you would need to take a look at the purpose and use of the site. And, a good rule of thumb is to **use an abundance of caution**. If you use any part of it to promote your professional services or listings, then it's time to look back and make sure you are in compliance with the Florida Administrative Code as well as the NAR Code of Ethics. Remember, FaceBook allows for both personal and business pages. So why not do both?

Conclusion

The real estate industry is changing constantly and thus the demands of our customers are changing as well. As more Generation X and Y buyers come into the marketing, their expectations of customer service and communication will be different than the traditional customer of years past.

However, while the communication approach may seem more casual, it is imperative to maintain our professionalism. It is also critical to take extra steps to protect our customer's private information as well as reduce our risk and liability over the Internet.

Good luck and let me know if you have any questions!

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