



CLOSING MANAGEMENT – CORE SERVICES QUESTIONNAIRE

The information below is **required 3 days prior to your scheduled Closing Management – Core Services Kick Off call** so we can determine how best to help you manage your closings.

Please complete the following information and return to your Key Assistant.

Client Information

- 1. First Name: _____
- 2. Last Name: _____
- 3. Company/Team Name: _____
- 4. Contact Phone: _____
- 5. Email: _____

Business Overview

Last Year’s Information		This Year’s Information	
Total transactions/deals:	\$ _____		\$ _____
Average sales price:	\$ _____		\$ _____
Total GCI:	\$ _____		\$ _____

Estimated listings taken (not sold but taken): _____

Estimated % split of seller vs. buyer deals: _____ %/ _____ %

Client - Closed and Database

Confirmation of main database used for Clients and status of Listing and Closing Management in database.

Get 100% accurate for previous year and current YTD for Client - Closed - YEAR as in Client - Closed 2013, and Client - Closed 2014. Each record must also have Client-A, Client-B, Client-C rating, a Client-Buyer or Client-Seller tag to tell us the deal type, proper Source field completed, full contact information, and updated notes on original source of lead and future business and referral sources.

For most databases, the Closings records should be accurate for current YTD always within one week of closing including sales price and commission amounts.

Listing Management

1. About how many new listings per month during busy season? _____
2. How many listings do you currently have in inventory? _____
3. Who is doing Listing Management? _____

4. About how many hours for one listing? _____
5. Do you want us to either document a system or take over some or all of this function? _____

6. Any wish list items to improve Listing Management? _____

Buyer Management

1. Estimated number of buyer first meetings last year? _____
2. Are you able to produce a report of all buyer first meetings and results from last year? _____
(If not, we can put system in place to make that happen.)
3. Estimated conversion rate of first meeting to closed buyer? _____ %
(For example, out of 10 buyer first meetings, how many end up closing? If 5 of 10 close, that is a 50% conversion rate.)
4. If you think that percentage is different for you versus your buyer's agents, please detail estimates. _____

5. Do you get buyers pre-approved before showing and if so, who is your lender and working relationship and flow? _____

Closing Management

1. About how many closings per month during busy season? _____
2. Who is doing Closing Management? About how many hours for one closing? _____
3. If person doing Closing Management is some other local or virtual assistant and you are paying on a per closing or per file basis, how much are you paying per closing? (For example, \$200, \$300, \$400?) \$_____
4. Do you want us to create system or take over some or all of Closing Management functions?

5. What do you do during the under-contract and post-closing period to enhance Client Service and increase short-term and long-term referrals? _____

6. What would you like to add and start to do in future? _____

7. If service is top-notch, out of 10 client closings, how many total referrals do you think you should be able to get by Day 100 from those 10 clients that would lead to a first meeting with a buyer or seller lead within a few months? _____

Wish List

What are your top 3 wish list items to Focus Unique Talent, Delegate Everything Else, and Stop Wasting Leads related to these topics?

1. _____
2. _____
3. _____

Thank you for taking the time to fill out this questionnaire. Your answers will help us determine the best way to help you manage your closings.