

# Maximizing the First Appointment

So you've scheduled an in-person appointment with a lead. Great! Just like nailing the first call with a prospective client is important, so is nailing the first appointment. The key is to build rapport with the buyer and make the absolute most of your time together. It's also an opportunity to demonstrate why you're the best Expert agent for their home search. Here's how.

## Before the appointment, send a photo or video of yourself

Humanize the experience right away by sending your lead a photo or video of yourself. In addition to confirming you're a real person, it'll help them find you when it comes time to meet for the appointment. Whether it's your headshot or a selfie, make sure your face is clearly visible.

### TIP

Put as much preparation into a buyer's appointment as you would a listing presentation.

## Have a plan tailored to the buyer

If you've followed the ALM framework during your initial conversations with the buyer, you should have a good idea of where they are looking to buy and for what reasons. Use this information to come up with a plan specifically suited to your prospect's needs and desires, and demonstrate why you're the best fit to help them succeed.

Examples of things to take into consideration when preparing for the appointment:

- Desired neighborhood
- Budget and financing
- Motivation: timeline, external factors, the "why" behind the move
- Property type: condo, co-op, townhouse, etc.
- Square footage
- Number of bedrooms
- Unique apartment, building, or neighborhood characteristics

This people-first approach will highlight the care and consideration you put into every agent-client relationship, and that's a win for both of you.



## Set up multiple showings

Buyers rarely purchase the first and only home they visit during their search. Imagine a bride only trying on a single wedding dress before the big day. Seems unlikely, right? The same goes for homebuying.

Evaluate additional neighborhoods, apartments, and buildings to show your buyer during the first appointment. This will help build the buyer's confidence, extend your time together, and create rapport.

## Bring a buyer's packet

A buyer's packet is an informational packet that helps the buyer learn more about you (the agent) and the homebuying process. We recommend compiling one that contains:

- Your bio and business card
- Client testimonials
- Neighborhood guide or market update
- Steps to buy a home
- Pre-qualification information
- Co-op vs. condo cheat sheet

Buyer's packets create formality, set expectations, provide a tangible takeaway, and educate the buyer.

## Provide a superior customer experience

You can deepen the relationship and increase your closing rate by providing exceptional, personalized service throughout the appointment — and beyond.

Do this by being:

- **Attentive:** Listen closely and adopt their communication preferences.
- **Knowledgeable:** Share your expertise of the local market and the homebuying process.
- **Responsive:** Inspire confidence by getting back to people quickly.
- **Trustworthy:** Always act with integrity.