Safety from the Start

The Value of Initial Buyer Consultations & Screening

By Carl Carter, Jr., Founder of the Beverly Carter Foundation (a 501c3 non-profit dedicated to the safety of real estate professionals)

The phone rings, a text message pings, or an email inquiry lands in your inbox – it's a new buyer lead and they want to see the property at 123 Main Street as soon as possible! Fantastic news! You need to move quickly & efficiently to get in-touch with your potential new clients. There's just a few quick steps to perform before jumping in the car! Prior to meeting new clients at a vacant property, conduct an initial buyer consultation and obtain a copy of their identification.

"I just want to see the house; I don't want to consult or send my ID!"

Insisting upon an initial buyer consultation doesn't make you paranoid, inefficient, or lacking a service mindset. Alternatively, it establishes your professionalism, commitment to your safety and that of the sellers, and provides a great opportunity to build rapport with your new clients. Recognizing the insistence upon an initial buyer consultation and copy of identification can be a challenging conversation to conduct, the following scripting provides recommendations for navigating these discussions.

Client: Hi. I'd like to see the house at 123 Main Street that is for sale.
Agent: Great – I'm happy to help! May I have your name, please?
Client: My name is Sam Jones.
Agent: Are you currently working with another real estate agent, Sam?
When would you like to see the house? There is a [office/restaurant/coffee shop] close to the property. We can meet there quickly and then go tour the home!
Client: Oh. I just want to see this house, and I was hoping I could see it today. I'm not working with an agent.
Agent: I can definitely show the property today, and we'll only need about 10-15 minutes to meet prior to touring the home. This will give me an opportunity to learn more about the types of things you're looking for in a home, so I can provide the best level of service to you. Could you meet at the [office/restaurant/coffee shop] at 4:30 or 5:00? It's less than a mile from the house at 123 Main Street. Will you be coming from work or home?
Client: I'll be driving there from work. I work downtown, so 5:00 would be best.
Agent: Great. Traffic shouldn't be too bad at that time. Where do you work, Sam?
Client: I work at 1st Bank Downtown.
Agent: Great. I'll see you at [office/restaurant/coffee shop] at about 5:00 then. We'll only need about 10-15 minutes, and please be sure to bring your identification so I can obtain a copy of it.
Client: Wow, that's a lot of steps just to see a house.
Agent: We'll get through it quickly and efficiently, I promise. Just a few steps to ensure I give you great service while ensuring we screen everyone that tours the home. As you can imagine, it's important for sellers to know that agents have done their due diligence to know who is going through their home. I'm looking forward to meeting you at [office/restaurant/coffee shop] at 5:00!
Client: Yeah, I guess I never thought about it like that. I'll see you at 5.

Bolder statements if the client still has objections:

- My company has a policy that I must first conduct a consultation and obtain a copy of ID for our records.
- For my personal safety, I always ensure I meet new clients in a public setting first. Sadly, many of my colleagues have been victims of crimes.

Consultation Tip: Use the *Client Profile Form* at www.BeverlyCarterFoundation.org to keep your consults consistent!