**SOP – Referral Agents Expectations** Logo, company name

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As a Referral Agent, you may be as involved or as uninvolved with your clients as you desire. Our Working Agents will take care of all the details for you. Here’s what you can expect from your Team:

* Title – We use the terms Referral Agent and Working Agent internally only. When talking to you clients we always use Business Partner, we are your Team!
* Working Agent – If you have a Working Agent you prefer to use with a specific client (personalities, etc), simply call that agent directly and coordinate an appointment time with them. If not, we can help in choosing by selecting whomever best fits.
* First Visit – Make sure the Working Agent accompanies you on your first visit to see your client (seller or buyer) and is introduced to them as your “Business Partner”. Your Working Agent needs this continuity to make the process work efficiently. It’s much more difficult to bring him/her in at a later time. If you don’t know the client, it’s just as well to send us out without you. If you are going to be absent from the first visit, that’s perfectly fine. Please let the client know that you will be sending out your “trusted” agent to work with them. Build the Working Agent up to give him/her a head start!
* Transition – The more you build up the Working Agent, the more your client will trust him/her and the smoother the transition will go. Best to do this right off the bat! Let the client know you wouldn’t be including him if you didn’t fully trust him. Anything less than that commitment from you will cause the client to continue to reach out to you and not the Working Agent, which is why we are here!
* Presentation – During the initial presentation, open the dialogue with the client, but quickly pass off the presentation to the Working Agent and allow him/her to do the vast majority of the presentation with short interruptions from you. The Working Agent has studied and maintained a GREAT presentation! Let him/her use it! However, short inputs or interruptions from you are good as it shows teamwork. We like to use it even if we have the listing sewed up already as it gives them more ammunition to refer you to others in the future. We’ll always be respectful of their desires and time.
* Paperwork – We will do all the paperwork for you, please allow us to do so. That’s our job! And we will keep you informed of all our negotiations for both the contract and the BINSR.
* Negotiations – Please don’t negotiate anything with the client without your Working Agent in on it as that will create confusion and a dependence upon you, which you’re supposedly trying to get away from! If client calls you and asks your advice, simply say, let me check with the \_\_\_ and we will get back to you.  You may not be fully aware of what preceded this phone call.
* Future Contact – Let the clients know that they are welcome to call you anytime (if that is true), but that the Working Agent will be more on top of the details of the transaction so if they choose to start with them, they will get a faster response. We are all here for them – the whole team! We will normally be in touch with them weekly at a minimum. If you want, it’s good to check in with them occasionally just to say hi and ask if all is going well. Let us know immediately if they have any concerns. When it comes to transactions, it’s best to allow the Working Agent to do all the communications so we don’t overlap and miscommunicate. We will keep you informed. When talking to clients, we try to use the phrase “Sherie (or you) and I …”, it always lets them know you are on top of what’s happening. Please use that too when you are discussing real estate with them, it helps us all!
* Costs – Below is a list of costs items. The Working Agent together with the Team Lead will decide if we need to deviate from these standards.
* Pictures – we cover pics and use Rob Horgan for most of our homes. If it is a very nice and expensive home, we can contract with someone else for twilight shoots. Rob can also do twilight shoots at a more reasonable price, but his lighting is not quite as soft. Rob is excellent at mid-day shots from inside with views; he photoshops the windows, but we need to tell him which ones you want.
* Drones – it takes a very special home to make the $300 drone shots worthwhile. No homes next door as otherwise all the drones do is highlight the tightness of the neighborhood. We will cover the expense of the drone.
* We can also offer 360° MatterPort Tour for more special homes that it would enhance. We normally will offer this OR the Drone Tour IF it’s a higher end home.
* $235 Long Fee – we always let the client pay for that and mention that in our initial meeting. If they then object, we can cover it for them.
* Floor Plans – A lot depends upon the reason for the Floor Plan:
  + If because the Assessor’s square footage is off for some reason, we ask the seller to cover that expense as it is not our fault and we’re trying go get more square footage and money for them!
  + If we’re only using it only for marketing and it’s an unusual or very large home that needs a floor plan, then we can cover it.
* Referral Agent Farms – we will cover a bi-annual farm mailing IF it is an area that the Referral Agent has farmed for years with good success.
* Buffini Items of Value – we will mail out monthly to your top clients, ones you stay in touch from time-to-time and have a relationship with. We will try to form a relationship with them too in the hopes of them sending you even more referrals.
* We can also offer Long Realty Housing Reports (Main Tucson) or the In-Touch Newsletter mailed to your clients quarterly or monthly instead of the Items of Value mailings if desired.
* Team Events – we want your relationships at our Team Events (Thanksgiving Pie, Ball Games, etc). This is at our expense and has turned out to be the very best method for us to connect with your clients. Connecting with them creates more trust and more referrals!