**Presenting the Team** A picture containing drawing

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One of the most difficult processes in Stepping Up! is the transition of clients from the Referral Agent (RA) to the Working Agent (WA). Over the years, with the help of professional speakers and trainers, and after several failed handoffs, we have developed some valuable ideas:

* Develop a Team Card showing each Referral Agent as the center of his/her Team. Use a 3.50 X 4.25 card with our Team Branding. Make a separate card for each RA and send them out with your introductory letter as each RA joins your Team.

 

The layout could included the Team Leads strategically placed on the left side, the Referral Agent strategically placed near the center, and other agents and assistants that may be working with that RA placed to the right or around the RA. Make the focus on the RA in the center! Branding should match your business cards and Team branding.

* Another idea is to include their picture in your Buyer/Seller books with a short bio. Make them look like a significant part of the team.
* Refer to each other (Referral Agents, Working Agents, Team Leads) as Business Partners.
* It is most effective (if possible) to have the Referral Agent accompany the Working Agent on the first appointment/interview. The Referral Agent should start out introducing his/her Team Members that are present. Talk a little about their background and experience – introduce the Team as his/her Team! (See our example on YouTube: <https://youtu.be/wi9e3NOLiZI> )
* If the Referral Agent does not accompany the Working Agent on the first appointment, they can explain on the phone how the Team operates.
* Once introduced by the RA, the WA should pick up most of the presentation and show his expertise and caring. The RA should interrupt from time to time adding value and showing that the Team is a joint effort. This also allows the WA to regroup thoughts. But allow the WA to monopolize. Possible lead ins:
  + The RA may want to have 2 or 3 points about the presentation memorized ahead of time and throw those on the table at the start. IE – “[WA] uses a professional photographer and he really knows how to tell the ‘story’ of a home.” “We will provide you with a professional floor plan for your home which is a fabulous tool for marketing!”
  + Then the RA can hand it over to the WA – “Now I’d like to have [WA] explain a little about today’s market and how to best sell houses!”
  + The WA explain the functions of each on the Team. Again, focus on the RA as being the king/queen!
  + Then on with your normal listing presentation.
* Ideas an RA may use to transition a client to the Working Agent are:
  + The WA knows that area of town better than me.
  + The WA is more up to date on the newest technology/internet that we use in marketing today.
  + The WA will have more time to dedicate to you!
  + I’m planning on being out of town.
  + I’m spending most of my “available time” managing the Team now.
  + You don’t want me to market for you, you want my Team as they are on top of the latest marketing trends!
  + I simply am not showing homes anymore, that’s why I have a Team, and I’ve trained them well in taking care of my clients the way they’re used to being cared for.
* The value of a Team:
  + Added availability.
  + Experience.
  + Extra eyes and ears.
  + Brainstorming for listing marketing.
  + Someone is ALWAYS there for you!
  + Focus in different areas of expertise.