

## CLIENT CARE INFORMATION

Automated emails (*details below*) will be sent to all clients between the time their contract to purchase has been recorded in the IMS and closing on their new home, provided we have a valid email address in the system.

This program consists of 5 emails sent to buyers and 3 emails to sellers at various points after contract. The emails for buyers contain congratulations, helpful reminders about homeowner's insurance, transferring utilities, post close tasks, and filing for property tax exemptions (in applicable markets). The emails for sellers contain congratulations, tips on marketing their home, and moving tips & checklists. The Client Care Coordinator's photo, name, and title is at the bottom of each email along with a market-specific email address they can use to send feedback. Each email encourages your clients to contact you should they have any questions about their transaction.

Ratings/Testimonials: A few of these emails request a rating/testimonial from your clients. The question we ask is "On a scale from 1-10 (10 meaning you would absolutely recommend us), how likely will you be to recommend EasyStreet/Highgarden to a friend or family member?" As we begin this program and are receiving replies, it is exciting to see the overwhelming number of 10s! Across all markets, our agents are doing a FANTASTIC job at executing our company's mission: To create an atmosphere and experience which turns our team, clients and associates into "Raving Fans."

All ratings & testimonials received are recorded in the lead's notes so that you can use them for personal marketing and to identify excellent referral sources. In addition to receiving a notice each time a rating is received from your client, you can see individual ratings/testimonials in the lead notes for each client that sends them. You can access a report of all ratings/testimonials received from your clients by going to Reports > Client Rating Report in the IMS.

Opting a client OUT of Client Care emails: If for any reason you do not want a client to receive these Client Care emails (for example, they are an investor client buying multiple properties, or you have a transaction coordinator that is already contacting them with this information), you should indicate this in the SkySlope file for each transaction. You can add a note to the checklist letting us know to turn it off.

## Buyers:

### *Congratulations on finding your next home!*

- Sent the day after the sale is entered in our system
- Congratulations, introduces the client care program
- Requests a rating/testimonial (see below)

For EasyStreet markets: "On a scale from 1-10 (10 meaning you would absolutely recommend us), how likely will you be to recommend EasyStreet Realty to a friend or family member?"

For Highgarden markets: "On a scale from 1-10 (10 meaning you would absolutely recommend us), how likely will you be to recommend Highgarden Real Estate to a friend or family member?"

### *Your Homeowner's Insurance Policy*

- Sent between contract and closing
- Reminds buyers to begin shopping for Homeowners Insurance if they have not already
- List reasons WHY they should get homeowner's insurance, WHAT type of coverage there are, and a list of potential discounts that could lower the cost of their annual premium (multiple policy, new construction, senior citizens, etc.)
- Does NOT recommend any specific insurance agent or company

### *Reminder - Transfer Your Utilities*

- Sent prior to estimated closing date provided on Contract Information sheet completed by the agent
- Reminds buyers to contact utility companies that service their new home to get services transferred into their name
- Explains that many utility companies do a "soft" credit inquiry that will not affect credit like a new credit card or loan
- Directs them to contact their Realtor to get a list of service providers for their new home

### *Congratulations on your new home!*

- Sent the day after the closing is entered in our system
- Congratulations & a few important reminders about first mortgage payment and keeping closing statement for possible income tax deductions
- For Indy, Atlanta, Tampa, and Orlando markets ONLY - reminder about filing for property tax exemptions
- Requests a rating/testimonial (see below)

For EasyStreet markets: "On a scale from 1-10 (10 meaning you would absolutely recommend us), how likely will you be to recommend EasyStreet Realty to a friend or family member?"

For Highgarden markets: "On a scale from 1-10 (10 meaning you would absolutely recommend us), how likely will you be to recommend Highgarden Real Estate to a friend or family member?"

### *Reminder - File Your Property Tax Exemptions*

- Sent ONLY in Indy, Atlanta, Tampa, and Orlando markets
- Sent 30 days after closing
- For Indy: reminds them to be sure they received a receipt for their homestead exemption and to file for their mortgage exemption and/or any others they may qualify for. Lists Central Indiana County Auditor locations, phone numbers, and online filing links for Hamilton, Hendricks, and Marion Counties.
- For Atlanta: reminds them to file for homestead exemption and/or any others they may qualify for. Gives links to Georgia Tax Guide website, a county-specific contact information lookup, and the forms needed for filing.
- For Tampa/Orlando: reminds them to file for homestead exemption and/or any others they may qualify for. Gives a link to the Florida Department of Revenue's property tax exemptions website.

## **Sellers:**

### *Congratulations on listing your home!*

- Sent the day after the listing is entered in our system
- Congratulations and introduction to client care program
- Includes 12 helpful marketing tips to help market and sell their home. (Elaborates on each of these 12 tips - Paint Walls a Neutral Color, Polish the Metal, Refresh the Appliances, Clean Up the Driveway, Clean the Carpets, Have a Garage Sale, Spruce up the Front Door, Let There Be Light, Keep Up the Lawn, Start Packing, Prepare for Showings, and Check the Price)

### *Preparing for your move*

- Sent the day after the pending sale is entered in our system
- Congratulations on accepting an offer, encourages them to discuss the details of their offer with you to be sure all responsibilities are met according to contract deadlines
- Lists tips for saving money on the move (Book the Movers Early, Inquire About Additional Fees (with movers & service providers at their next home), Make a Plan, Follow the Budget, Get Rid of the Junk)
- Includes a Moving Checklist and Packing Tips attachment

### *Thank you for your business!*

- Sent the day after the closing is entered in our system
- Requests a rating/testimonial (see below)

For EasyStreet markets: "On a scale from 1-10 (10 meaning you would absolutely recommend us), how likely will you be to recommend EasyStreet Realty to a friend or family member?"

For Highgarden markets: "On a scale from 1-10 (10 meaning you would absolutely recommend us), how likely will you be to recommend Highgarden Real Estate to a friend or family member?"