



REAL ESTATE

COMMUNITY

FUNDRAISING

OUTREACH

What Matters is your HEART

Putting What Matters First

Honing in the most important aspects of the purchase or sale for each client

Efficiently communicating in a way which exceeds client expectations

Always going above and beyond what is promised

Recognizing clients, Realtor colleagues, and the community with gratitude

Treating everyone by the *Golden Rule* - "Do unto others as you would have them do unto you"



What Matters Partner HEART Guidelines

1. **Hone** in on the most important aspect of the purchase or sale for each client.

- Carefully listen to the client to determine top priorities in their move (price, time frame, extenuating circumstances).

2. **Efficiently** communicate in a way which exceeds client expectations.

- **Texting:** Do they text? Do they prefer phone calls or emails?
- **Time:** What times of the day or which days do they prefer to be available for their real estate transaction? What times of day will you be available?
- **Stay in Touch:** How often would they like to stay in touch? Set expectations upfront and always respond as soon as possible (all clients should feel like they are top priority).

3. **Always** go above and beyond what is promised.

- Vow to never commit to anything you can't deliver. Write down what you discuss with clients to make sure you follow through.

Listing Agent Minimum Standards

- **30 photos** must be input in MRIS (it is suggested that the top 8 interior and exterior photos are listed first) prior to going live. Room measurements must be included (unless detrimental to marketing).
- **A full color brochure** (with enhanced custom blurb and/or bulleted list of all material features sellers have disclosed about home) must be made and left inside and outside home (in brochure box).
- **Community handouts** (city/county brochure, local map, school information, community profile - - free from Visitor's Center or online) must be displayed in property.
- **A "Sellers Top Reasons They Love Their Home" list** should be solicited by sellers and created into a brochure for display at home and uploaded in view docs on the MLS.
- **Home improvement data** should be collected and sellers should be asked the dates, value and approximate amount of improvements they have made to the property since their purchase.
- **Dual agency may not be practiced for What Matters Partner referrals.**



Buyer's Agent Minimum Standards

- Clients must be invited to have a complimentary **buyer's consultation** prior to viewing property OR be given a packet (with its contents explained) showing benefits of using a Buyer's Agent at first meeting (even if first meeting is at a property).
- Clients must be set up on an **email notification system** of new listings matching their criteria.
- Clients must be **contacted weekly**.
- Clients must be sent a **monthly report** showing homes under contract or sold in their price range.
- Clients must be **encouraged to have home inspections** (even when purchasing a new construction).
- **Dual agency my not be practiced for What Matters Partner referrals.**

4. **Recognize** clients, Realtor colleagues and the community with gratitude.

5. **Treat** everyone by the *Golden Rule* --"Do unto others as you would have them do unto you."



What Matters Partner Commitment & Acknowledgement

I, _____, am committed to the What Matters Values as identified in the What Matters Partner HEART Guidelines. It is my intention to treat each and every referral from BETH in a manner which supports these values and promotes successful and professional relationships with clients, other agents, and our extended team of professionals.

I understand receiving What Matters Partner leads will depend on my ability to follow-through with these values from initial contact to the closing table.

I agree to update BETH monthly (at a minimum), on the status of the lead or as requested.

I understand that there will be a 30% referral fee for each closed buyer and/or seller referral. There will be no referral fee collected for rentals or properties under closing price of \$75,000. After the initial closing(s) with referred client, no referral fee is due from subsequent closings. If the client is both a buyer/seller lead initially, the referral fee is due from each the sale and purchase.

I understand that 100% of the referral fee that is collected from What Matters Partner commissions will be earmarked and will help to fund What Matters programs and initiatives in the areas of Real Estate, Community, Fundraising and Outreach.

I understand that Beth is available for consultation regarding What Matters Partner transactions.

I understand that a What Matters Partner rider is required to be placed on the referred listing client's yard sign. The rider will be provided by BETH.

PRINT NAME

DATE

SIGNATURE OF PARTNER AGENT

DATE

BETH MEDVED WALLER, REFERRING AGENT

DATE