



## Post-Closing Drill

- 1) On the day of the closing we recommend a simple thank you gift. Agents may make it possible to surprise their satisfied clients with Champagne, glasses, Thank You card and Two professional housecleaning personnel on their closing date for a small fee. This gift makes it a personal touch that can be used and appreciated. You may consider any number of closing gifts throughout the office. Gift baskets are displayed throughout the office. You need to do something memorable. Many Realtors personalize a brass doorknocker with the family name.  
**Ordered: 5 days prior to closing Delivered: At closing**
- 2) Prior to you submitting your check request usually at the closing table, you must review the entire file and ensure all FREC or RESPA required documentation is in your file. Also it is required that you have copies of inspection reports in your file for E&O claims. If you do not know what documents are required see the floor sheet, contract information and escrow sheet in the forms drawer.
- 3) Again, before you submit your check request and after your file is FREC & RESPA compliant, you will want to hold yourself accountable to obtaining your clients forwarding address. You will be well served to obtain all of the information prior to leaving the closing table. (HINT: if you have good rapport with the co-op client we recommend you add them to your database as well.
- 4) First enter your clients forwarding contact information into your EXCEL or other contact management database. IT IS REALLY EASY. Do not avoid this simple learning curve any longer. Make sure all of your past clients are available at the push of one button. Mailing labels need to be printable in a minutes notice. MAIL MERGING and Preprinted envelopes will project the image you need to be competitive in residential real estate.
- 5) BEFORE you submit your check request! Handwrite a thank you card short but sweet! Mail on the closing date!
- 6) Before you submit your check request! Hand address or preprint an envelope for your customer satisfaction survey and lick it stamp it stuff it at and set aside for mailing within 5 days.
- 7) Before you submit your check request! Hand address or preprint an envelope for your Homestead reminder letter. MAIL MERGE it, lick it, stamp it, stuff it and set it aside for mailing within 45 days after closing.
- 8) Before you submit your check request! Hand address or preprint an envelope for your holiday greeting card. Sign it, lick it, stuff it put it in a box for December 1 mailing on December 1 stamp it and mail it with all of your others that you accumulated in a safe place throughout your year.
- 9) Before you submit your check request! Hand address or preprint an envelope for your Tax Ramifications reminder. Mail Merge it. Lick it, stuff it with a copy of your card and their closing statement. Set it aside in a safe place for mailing and stamping January 10 the following year. On Jan 10 deliver all of your post-closing drill Tax Ramification reminders to the post office.
- 10) Every month you should include your consumers in a postcard or letter campaign. If you are lazy or broke and wish to cut back on your commitment mail a minimum of 6 X per year. If you can't commit to that you need to go get another job, that provides more structure and accountability because you may have a hard time making it in the real estate business.
- 11) There are automated solutions for past customer follow up that you can explore on [magicalcommunications.com](http://magicalcommunications.com) OR [postcardmania.com](http://postcardmania.com) OR [directmailsolutions.com](http://directmailsolutions.com)... you will be shocked at the value and opportunities for automated direct mail solutions if you browse the internet keyword DIRECT MAIL
- 12) We recommend that you telephone or visit your past client no less than 2 X per year forever to solidify your place in their consciousness.