



## ORANGE *leaf* CONSULTING

# THE 6 MOMENTS YOU CAN “WOW” YOUR CUSTOMER IN EVERY TRANSACTION

In every transaction, there are touchpoints that represent a significant step forward or a major accomplishment. Identify what these are in your organization, and make sure your team members know them and the role they play in them. These are the “WOW” moments! Here are a few ideas that you can implement.

### 1. ORDER OPENED AND/OR RECEIVED

- **WOW Moment:** The client has decided to engage. This is a cause for celebration!
- **Action to Take:** Email or phone call congratulating them and sharing your excitement.

### 2. COMMUNICATION/FILE WORKFLOW PREFERENCES DISCOVERED (Directing or Non-Directing Agent)

- **WOW Moment:** Early in the process, learn the client's preferences, to customize their experience—adjust accordingly.
- **Action to Take:** Phone call to determine if they prefer phone, email, or text, and when they want to hear from you.

### 3. CLEAR TO CLOSE

- **WOW Moment:** Confirming you are ready to go--now it's a party!
- **Action to Take:** A phone call (or email) to let them know that the information has been sent, that you loved working with them, and look forward to the next time you get to WOW them.

### 4. CLOSING APPOINTMENTS SCHEDULED

- **WOW Moment:** The final step is on the calendar—start counting the days and get ready to WOW them in person.
- **Action to take:** Call or email to determine closing preferences (i.e., food, drinks, parking, etc.)

### 5. CLOSING TABLE

- **WOW Moment:** It's happening! It's for real!
- **Action to take:** Make this a celebration for all--brag on the agents, lenders, and ask everyone to come back again.

### 6. TRANSACTION REVIEW/ASK FOR ANOTHER ORDER

- **WOW Moment:** Follow up, get feedback and ask how (WELL) you did---keep the conversation going.
- **Action to take:** This is a great phone call to get info on what you can do to make their next closing even better, and a chance to ask for an order or referral.

Call us to **GROW** Big!



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One Sansome Street, Suite 1400 | San Francisco | California | 94104  
415.590.4878 | [www.orangeleafconsulting.com](http://www.orangeleafconsulting.com)  
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