



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 our 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 us.

3. CLEAR TO CLOSE

- **WOW Moment:** Confirming we 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, we loved working with them, and we look forward to the next time we 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) we did---keep the conversation going.
- **Action to take:** This is a great phone call to get info on what we can do to make their next closing even better, and a chance to ask for an order or referral.

Call us to **grow** Big!

Follow Dr. Cindy and OLC



@1stLadyofSales | @OrangeLeafCo



One Sansome Street, Suite 3500 | San Francisco | California | 94104
415.590.4878 | www.orangeleafconsulting.com

ORANGE *leaf* CONSULTING.com