

# Tips for Success: Virtually Managing Clients

When it's not possible to take clients to view a home in person, your smartphone has almost everything you need to give them an experience as good as being there.



## TOOLS YOU'LL NEED



**A smartphone**



**At least one video calling app  
— ask what your clients prefer**  
e.g. FaceTime, WhatsApp, Skype, etc.

### A

#### Appointment

- Show enthusiasm for offering a virtual appointment or tour — some clients are hesitant to ask because they're concerned it's inconvenient for you.
- Set expectations for the appointment.
- Validate your virtual tour expertise with previous clients' experience.
- Follow up to confirm the appointment through text or email.

### L

#### Location

Offering video call tours can actually give you more options, as it's easy to add on additional pre-recorded videos of other properties in the area that may be of interest.

### M

#### Motivation

By phone or live video call, working with a remote client offers an opportunity to ask deeper questions about motivation.

## VIRTUAL TOUR LOGISTICS

There's more than one way to give clients virtual tours. **Some options include:**

- A video call in which you talk to the buyer in real-time and can answer questions on the spot.
- A pre-recorded video tour, to be followed by a live call for further discussion and questions.
- A 3D Home tour. Share the tour link with your client, then follow up by phone, video chat, text or email.

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### Preparation:

- Familiarize yourself with the layout of the house.
- Turn on all the lights.
- Open all the doors.
- Plot your route starting from the street, then the front door, first floor, second floor and through to the backyard.
- Don't overlook easily forgotten spots like the garage, closets and the neighborhood.

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### Tips for video and live video call tours:

- If you're pre-recording a tour to send, put your phone in airplane mode so that your video isn't ruined by an incoming call or message.
- Show up like you would for a face-to-face showing. Be professional, but authentic.
- Narrate everything you see, with callouts for specific things you know are important to the buyer.
- Don't just hold the phone at eye level. Remember to pan up and down to give a full view of the home, ceiling fixtures and treatments, flooring and finishes.
- At the end of the virtual tour, set your next appointment.
- Use text recommendations and My Agent insights to keep your client engaged.
- Ask for feedback about how the tour went.

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### 3D & Video Home tours:

Contact your preferred virtual tour firm to see what options they offer for either 3D home tours or video home tours. In1View offers video home tours as well as Matterport virtual tours for homes. This will give consumers a much better idea of the layout and feeling of the home without physically being there.

