

# PREMIUM CLIENT COMMUNICATION KIT

Operational Excellence & Lifetime Retention Blueprint

## 1. THE TRANSACTION LIFECYCLE (LISTING & PURCHASE)

Division of Labor: Ensuring every milestone is met with precision while protecting the Agent's time.

Phase	Communication / Action Point	Primary Lead
Intake	Compliance audit of Listing/Sales Agreement and initial disclosure delivery.	TC (Operations)
Launch	Strategy call for pricing, marketing plan, and showing instructions.	Agent (Strategy)
Under Contract	Introduction to all parties and delivery of the "Roadmap to Closing."	TC (Operations)
EMD/Escrow	Confirmation of deposit receipt and distribution to necessary parties.	TC (Compliance)
Inspection	Scheduling access (TC) vs. Negotiating Repair Requests (Agent).	TC / Agent
Appraisal	Monitoring for appointment date and status updates to client.	TC (Logistics)
Financing	Lender follow-up for loan commitment and CTC (Clear to Close).	TC (Tracking)
Closing	Final CD review (TC) vs. Personal Handover/Celebration (Agent).	TC / Agent

## 2. TC MILESTONE EMAIL MATRIX

Specific "Operational Touches" where the TC handles the client, freeing the Agent for high-dollar activities.

Milestone	TC Outgoing Email Content	Agent ROI
Intro	"Welcome to the Deal": Intro, Timeline, and Checklist.	Professionalism
Inspection	"Logistics Update": Home prep tips and vendor arrival times.	45 Min Saved
Pre-Closing	"Moving Day Guide": Utility transfer links and keys logistics.	Reduced Anxiety

# RELATIONSHIP ELEVATION

Turning One Transaction into a Lifetime Referral Engine

## 3. THE LONG-TERM RETENTION MENU

Ideas for the Agent to stay "Top of Mind" (TOM) with TC support to ensure consistency.

### Strategic Outreach Ideas

#### The "January Tax Concierge"

Send a PDF of the Final Settlement Statement (HUD/CD) to the client so they have it ready for their tax professional. This is one of the most appreciated "utility" touches an agent can provide.

*\*\*TC Value:\*\* We can pull this document from the archived file and manage the bulk email send for you.*

#### The Annual Equity Review (CMA)

Every year on the anniversary of their purchase, provide a brief "State of Your Investment" report. Show them how much their equity has grown since closing.

*\*\*TC Value:\*\* We trigger the CRM task for you and provide the baseline closing data from the previous year.*

#### Seasonal Home Maintenance Reminders

Provide value by being the expert on their home. Send checklists for "Winterizing Your Pipes" or "Spring HVAC Tune-ups."

*\*\*TC Support:\*\* We can schedule these seasonal value-adds to deploy automatically through your CRM.*

#### The "Housaversary" & Personal Milestones

A simple card, a 30-second video text, or a small gift (like a local restaurant gift card) for the anniversary of their home purchase, birthdays, and anniversaries.

*\*\*TC Support:\*\* We track these dates during intake and ensure your CRM alerts you 7 days before.*

#### The "Mayor of the Neighborhood" List

Send a quarterly update of your "Preferred Vendor Network" (the best plumber, landscaper, or painter). Clients always need a reliable pro.

*\*\*TC Support:\*\* We host and maintain this digital list for you to share easily.*

#### Home Warranty Expiration Alert

In month 11 of homeownership, remind the client their home warranty is about to expire. It shows you are still looking out for their wallet.

*\*\*TC Support:\*\* We track warranty dates and schedule this automated reminder.*

#### Quarterly "Just Sold" Neighborhood Pulse

Send a snapshot of homes that sold within 1 mile of them in the last 90 days. People are always curious about

*\*\*TC Support:\*\* We can assist in gathering the address data for these hyper-local updates.*

### **Client Appreciation RSVP Management**

Hosting a movie night, a pumpkin patch giveaway, or a family photo day? The administrative burden of these events often prevents agents from doing them.

*\*\*TC Support:\*\* We can manage the invite list, RSVP tracking, and follow-up emails for your events.*

**The Bottom Line:** A client who receives consistent value *after* the check clears is 4x more likely to refer friends and family. Draft to Doorstep doesn't just help you close; we help you build a durable, referral-based business.